



CONTRACT NO. 12-028
BOARD ACTION 36331.D3c
BOARD DATE 4/9/12

April 3, 2012

Dr. Pamela Homan
Superintendent
Sioux Falls School District
201 E 38Th St
Sioux Falls, SD 57105-5815

Dear Pam,

The District Management Council (DMC) is pleased to share with you the results of our analysis of your speech and language staffing needs. As budgets tighten, districts are looking for ways to reduce costs while preserving (or even improving) services to children. Based on the data provided, it appears that substantial efficiencies can be gained through criteria-based scheduling of your speech and language services.


In most districts, speech and language therapists create their own schedules. This means that each therapist decides independently whether children are seen individually or in groups and how much time is required for meetings, report writing, and testing. Few other staff in a school district are afforded this level of discretion. DMC's technology solutions division has developed a systems thinking approach to staffing and scheduling speech and language services. It combines powerful analytical tools, sophisticated scheduling algorithms, best practice service delivery research, district developed staffing criteria, and in-district implementation support. This combination of web-based tools and consulting services can significantly reduce costs, improve student outcomes, increase compliance, and create more consistent practices from school to school.

Based on the data provided, the potential savings in your district could be up to \$2,000,000 over three years. If the technology is expanded to PT, OT, and other special education staff, even greater gains are possible.

The enclosed report details our estimations and assumptions. The forecasted savings are very much in line with what we have observed in other districts.

I look forward to continuing the conversation about how we might help the district do more with less.

Sincerely,


Nathan Levenson
Managing Director

The District Management Council

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Speech and Language Scheduling Analysis

Sioux Falls School District

April 3, 2012

The District Management Council (DMC) is pleased to present these findings for improving the equity, effectiveness, and cost-effectiveness of providing speech and language services.

The goal:

Identify potential new approaches and strategies to effectively and cost effectively staff and schedule speech and language services. This process doesn't create ready to implement schedules, but rather nearly ready to implement schedules to show what is possible. Therapists make the final edits and refinements.

The process:

1. We received data from the district detailing IEP requirements for speech and language services from a sample of 10 schools. We also gathered basic information about school schedules. To expedite the process, we have assumed a thoughtful schedule for when ELA is taught in each elementary school, such that students won't be pulled from this important subject. (See appendix 1 for a summary of the data received and any concerns we may have had regarding the completeness of the data).
2. We established sample, typical criteria for creating optimal schedules. Through the power of dmStaffing we can easily re-run the analysis and schedules to perform what-if scenarios to calculate the impact of different criteria.
3. dmStaffing calculates hundreds of possible schedules that meet all the IEP needs (including required group size, setting such as push-in or pullout, and frequency), the district's criteria for staff workload, and each school's schedule. The optimal set of schedules that meet all these constraints are presented.
4. The computer's recommendations are reviewed and further edited to create practical, cost-effective schedules and staffing allocations. The software does allow individual therapists to edit and fine tune their schedules as well.

The findings:

Based on the data provided we estimate that equity between staff members can be improved, 100% compliance scheduled, thoughtful groups created, students assured never to miss math, reading, or ELA and potential savings up to \$2,000,000 over three years.

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Potential savings

| | |
|-----------------------|----|
| Sample size (schools) | 10 |
|-----------------------|----|

| | |
|-------------------------------------|------------|
| Current FTE | 11.9 |
| Projected FTE required | 7.25 |
| FTE savings | 4.65 (39%) |
| | |
| Average salary & benefits | \$53,000 |
| Total three year savings for sample | \$739,000 |

| | |
|---|-------------|
| Current total FTE in district | 33.2 |
| Estimated three year savings for district | \$2,000,000 |

A few caveats

The analysis is only as accurate as the data provided. We have also made a number of assumptions concerning schools having thoughtful master schedules. In order to fully achieve the benefits outlined, a comprehensive plan will be needed for implementation.

Technical Solutions Proposal

Sioux Falls School District

April 3, 2012

Expires: 90 days

The District Management Council is pleased to provide this proposal for a package of web-based tools, analytical services, consulting support, implementation assistance, and periodic training. These services will allow the district leadership to set guidelines for service delivery models and workload. This in turn will result in improved student outcomes, more equitable workloads, and financial savings.

DMC will help facilitate the development of the criteria for student groupings, service delivery model, and workload expectations. DMC will also share best practices in these areas to help start the conversation and planning process.

Our work will include extensive on site consulting to help generate thoughtful workload and grouping criteria and to create a level of buy-in from staff. This process will be informed by a detailed analysis of current schedules, workload, and grouping practices.

Based on the data analysis in the accompanying report, the district can expect up to a 39% improvement in scheduling efficiency. Given the 33.2 FTE speech and language therapists currently required, this would yield savings over three years of up to \$2,000,000.

dmStaffing Technology Solutions

| | |
|--|-------------|
| Current speech and language staffing (FTE): | 33.2 |
| Potential scheduling efficiency improvement: | 39% |
| Potential three year savings | \$2,000,000 |

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Based on a 3 year commitment

Setup & training

\$34,600

Import data, review data quality and assist in data scrubbing
Provide recommendations for future data collection efforts.
Assist in creating workload and service delivery model criteria
On-site training of administrators and staff.

Year 1 license

\$69,200

Includes hosting, updates and software maintenance.

Year 1 total

\$103,800

Performance penalty*

\$69,200

This portion of the licensing fee is waived if savings are not at least twice the cost of this agreement. See details.

Year 2 license

\$69,200

Import data, review data quality and assist in data scrubbing
Includes hosting, updates and software maintenance.
Training refresher.

Year 2 total

\$138,400

Year 3 license

\$34,600

Import data and review data quality.
Includes hosting, updates and software maintenance.
Training refresher.

Year 3 total

\$34,600

License fees for beyond year 3 will be locked in at year three rates.

* If dmStaffing does not generate schedules based on district developed criteria that provide savings to the district, then year 2 fees will be reduced by the amount of the performance penalty. Savings are calculated based on three years of staffing per the schedules generated. Savings must equal at least twice the cost of this proposal.

Acceptance by the district



Signature

Kent Alberty/Todd Vik


Name

President/Business Manager

Sioux Falls School District 49-5

District

Date

Acceptance by DMC

William L. Lavin
managing director

The District Management Council

Appendix 1 Data Received

The enclosed analysis is based on data provided by the district.

Date received: March 5, 2012

Number of schools: 10

Current Number of FTE therapists: 11.9

Number of students served: 523

Assumptions made to simplify the process:

- From speaking with the district, we understand that restricted times are determined on a building basis. It was indicated that although there are no rules surrounding restricted times, current practice is that some students cannot be pulled out of ELA. DMC was not provided detailed school based schedules for ELA, but have assumed a thoughtful schedule for ELA at the elementary level.
- There were 19 students whose homeroom was not provided. The district has indicated that these students fit one of two profiles; either they attend a parochial school and only come to the public school for speech therapy, or they are a preschooler available for speech only and do not attend the early childhood classroom program, but receive speech services. These students have been scheduled accordingly to receive services.
- There were 25 students who were listed as dismissed, moved, or no shows. After speaking with the district, it was learned that these students were included because they were reflective of the caseloads at the time the data was collected. These students have been scheduled to represent the changing caseloads of therapists, transitions, new identifications, etc.
- All Sioux Falls early childhood programs scheduled students in one of two, half day sessions, with the start and end times different from the elementary start and end times. The start and end times for the early childhood programs were scheduled according to the times provided by the district.
- If a student was scheduled as push in/pull out and received services more than 1x/wk, one service was scheduled as push in and the other scheduled as pull out.

Appendix 2

Workload and Scheduling Criteria

A powerful feature of the dmStaffing program is that it allows the district leadership to have a great deal of input into “how things are done” in the district. Key questions such as “What constitutes a full workload for a therapist?” or “Which types of children and needs are appropriately served in a group together?” are factored into the schedule.

The following criteria have been used in the development of this analysis. Alternative scenarios can be easily recalculated.

| | | |
|---------------------------------|---|-----------------------------|
| Target direct service for SLPs: | Maximum percentage of work spent providing direct instruction to students | 75% |
| Maximum caseload: | Maximum number of students per therapist | None |
| Maximum group size: | Maximum number of students in a group for students who may be grouped per their IEP | 5 |
| Maximum grade span: | Maximum difference in grades between any two students in a group. For example, a grade span of 1 implies 1st and 2nd graders can be grouped together | 2 |
| Travel time: | We can use the addresses from each school to calculate actual travel time and distances. A minimum and/or fixed commute time can also be set. | 30 minutes |
| Restrictions: | Restrict certain times when students may not receive services, e.g. lunch, math, ELA | Reading at elementary level |
| Allow mixed durations: | Allow grouping of students with different session lengths, such as 40 minutes and 30 minutes (sessions will always start at the same time, but end as needed) | Yes |
| Allow partial day scheduling: | Allow therapists to be scheduled for quarter days, half days, or full days | Yes |

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Schedule 1 – Anne Sullivan Elementary

[illegible]

[illegible]

[illegible]

Schedule 4 – John Harris Elementary

| | Mon | Tue | Wed | Thu | Fri |
|---------|--|---|-------------------------|---------------------------------|--------------------------------|
| 8:00am | Alia Ebyes B, Hayden K, Hassan J, Jandani W = | Hayden K, Hassan J, Jandani W, Lapid B, Trevor T = | Alia E, T = | Veronica K = | Prep, report writing, meetings |
| 9:00am | Alia E, T = | Andrew T, Chessa J, Kaden = | Chessa J, Henden K = | Carter B, Conner V, Gerson = | |
| 9:30am | Andrew T, Hassan K, Kaden K = | Alia E, T = | Tessa W = | Tessa W = | |
| 10:00am | Andrew T = | Alia E, T = | Chessa J, Gerson J = | Lach B = | |
| 10:30am | Andrew T = | Alia E, T = | Chessa J, Gerson J = | Lach B = | |
| 11:00am | Andrew T = | Alia E, T = | Chessa J, Gerson J = | Lach B = | |
| 11:30am | Andrew T = | Alia E, T = | Chessa J, Gerson J = | Lach B = | |
| 12:00pm | Andrew T = | Alia E, T = | Chessa J, Gerson J = | Lach B = | |
| 1:00pm | Andrew T = | Alia E, T = | Chessa J, Gerson J = | Lach B = | |
| 2:00pm | Andrew T = | Alia E, T = | Chessa J, Gerson J = | Lach B = | |

Schedule 5 – Oscar Howe Elementary

| | Mon | Tue | Wed | Thu | Fri |
|---------|--|--|--|--|--|
| 8:00am | 8:00 - 8:20 Carter T, Nathan 8:20 - 8:40 Haley M, Kalen R, Matthew | 8:00 - 8:20 Abraham M, Robert 8:20 - 8:40 Haley M, Katherine, Matthew | 8:00 - 8:20 Haley M 8:20 - 8:40 Caleb B, Kalen R, Jordan R | 8:00 - 8:20 Kalen R 8:20 - 8:40 Matthew M | |
| 9:00am | 8:40 - 9:00 Caleb B, Emma H, Jason G 9:00 - 9:20 Alexander H, Alissa H | 8:40 - 9:00 Caleb B, Emma H, Jason G 9:00 - 9:20 Alexander H, Alexander C | 8:40 - 9:00 Tyler E 9:00 - 9:20 Jason G | 8:40 - 9:00 Tyler E 9:00 - 9:20 Jason G | 8:40 - 9:00 Tyler E 9:00 - 9:20 Jason G |
| 10:00am | 9:20 - 9:40 Caleb F, David M, Han S 9:40 - 10:10 Carter T 10:10 - 10:30 Jordan S, Jordan B, Jordan 10:30 - 10:50 Alexander K, Jordan M | 9:20 - 9:40 Caleb F, David M, Han S 9:40 - 10:10 Carter T 10:10 - 10:30 Jordan S, Jordan B, Jordan 10:30 - 10:50 Alexander K, Jordan M | 9:20 - 9:40 Caleb F, Han S 9:40 - 10:10 Jordan S 10:10 - 10:30 Jordan S 10:30 - 10:50 Jordan S | 9:20 - 9:40 Caleb F, Han S 9:40 - 10:10 Jordan S 10:10 - 10:30 Jordan S 10:30 - 10:50 Jordan S | 9:20 - 9:40 Caleb F, Han S 9:40 - 10:10 Jordan S 10:10 - 10:30 Jordan S 10:30 - 10:50 Jordan S |
| 11:00am | 11:00 - 11:30 Lunch | 11:00 - 11:30 Lunch | 11:00 - 11:30 Lunch | 11:00 - 11:30 Lunch | 11:00 - 11:30 Lunch |
| 12:00pm | 11:30 - 11:50 Domenicus B, Han S 11:50 - 12:10 Haley T, David M, Tyler R 12:10 - 12:30 Ryan K 12:30 - 12:50 Brian M, Elizabeth H, Malak J | 11:30 - 11:50 Domenicus B, Han S 11:50 - 12:10 Haley T, David M, Tyler R 12:10 - 12:30 Ryan K 12:30 - 12:50 Brian M, Elizabeth H, Malak J | 11:30 - 11:50 Domenicus B, Han S 11:50 - 12:10 Haley T, David M, Tyler R 12:10 - 12:30 Ryan K 12:30 - 12:50 Brian M, Elizabeth H, Malak J | 11:30 - 11:50 Domenicus B, Han S 11:50 - 12:10 Haley T, David M, Tyler R 12:10 - 12:30 Ryan K 12:30 - 12:50 Brian M, Elizabeth H, Malak J | 11:30 - 11:50 Domenicus B, Han S 11:50 - 12:10 Haley T, David M, Tyler R 12:10 - 12:30 Ryan K 12:30 - 12:50 Brian M, Elizabeth H, Malak J |
| 1:00pm | 12:50 - 1:10 Thomas L 1:10 - 1:30 Alexander H, Alissa H 1:30 - 2:00 Trey H | 12:50 - 1:10 Thomas L 1:10 - 1:30 Ryan K 1:30 - 1:50 Brian M, Alexander K | 12:50 - 1:10 Thomas L 1:10 - 1:30 Ryan K 1:30 - 1:50 Brian M, Alexander K | 12:50 - 1:10 Thomas L 1:10 - 1:30 Ryan K 1:30 - 1:50 Brian M, Alexander K | 12:50 - 1:10 Thomas L 1:10 - 1:30 Ryan K 1:30 - 1:50 Brian M, Alexander K |
| 2:00pm | 2:00 - 2:30 Kalen R | 2:00 - 2:30 Alexander M, Alissa H 2:30 - 2:50 Caleb R | 2:00 - 2:30 Alexander M, Alissa H 2:30 - 2:50 Caleb R | 2:00 - 2:30 Alexander M, Alissa H 2:30 - 2:50 Caleb R | 2:00 - 2:30 Alexander M, Alissa H 2:30 - 2:50 Caleb R |

[illegible]

Schedule 7 – Anne Sullivan Elementary/Anne Sullivan Early Childhood

| | Mon | Tue | Wed | Thu | Fri |
|---------|--|---|---|---------------------------|-----|
| 8:00am | 9:00 - 9:30 Adrianne F. = 9:30 - 9:40 Bryan T. Kenneth B. Nicholas 9:40 - 10:00 M. Aaron L. And H. Avery R. 10:00 - 10:20 Anthony W. = 10:20 - 10:50 Sabrina H. = | 9:00 - 9:20 Adrianne F. = 9:20 - 9:40 Bryan T. Kenneth B. Nicholas 9:40 - 10:00 Anthony W. = Pres. reser writing meetings | 9:00 - 9:30 Adrianne F. = 9:30 - 9:50 Leahs B. = | 9:00 - 9:20 Leahs B. = | |
| 10:00am | | | | | |
| 11:00am | 11:00 - 11:30 Lunch 11:30 - 12:00 Isabella B. = 12:00 - 12:10 Jacob G. = | 11:00 - 11:30 Lunch Pres. reser writing meetings | | | |
| 12:00pm | | | | | |
| 1:00pm | 12:30 - 12:50 Laron L. And M. Avery B. 12:50 - 1:10 Michael R. = 1:10 - 1:30 Brandon F. Cameron L. 1:30 - 1:50 Anthony B. Desu C. 1:50 - 2:10 Anthony W. Loren T. Marshall 2:10 - 2:30 Cassie H. Chene C. Tye J. 2:30 - 2:40 Audrina R. | 12:30 - 12:50 Cameron L. Desu C. M. Essey 12:50 - 1:10 Michael R. = 1:10 - 1:30 Michael R. Brandon F. Desu 1:30 - 1:50 Anthony B. = 1:50 - 2:10 Laron T. Marshall E. Peter B. 2:10 - 2:30 Anthony W. Cassie H. Chene | | | |
| 2:00pm | | | | | |

Schedule 8 – Horace Mann Elementary/ Harvey Dunn Elementary (includes students in Bridges program at Horace Mann)

| | Mon | Tue | Wed | Thu | Fri |
|---------|---|---|---|--|--|
| 8:00am | Dominic V. Joseph P. 8:00 - 8:30 = | Dominic V. Joseph P. 8:00 - 8:30 = | Prep, report writing, meetings 8:30 - 9:00 = | Artem A. Arden V. Arden H. 8:30 - 9:00 = | Artem A. Arden V. Arden H. 8:30 - 9:00 = |
| 9:00am | Alvin K. Dorian J. Roden G. 9:00 - 9:30 = | Alvin K. Dorian J. Roden G. 9:00 - 9:30 = | Prep, report writing, meetings 9:30 - 10:00 = | Arden H. Arden B. Arden B. 9:30 - 10:00 = | Arden H. Arden B. Arden B. 9:30 - 10:00 = |
| 10:00am | Isaac V. Ma G. 10:00 - 10:30 = | Isaac V. Ma G. 10:00 - 10:30 = | Isaac V. Ma G. 10:00 - 10:30 = | Arden H. Arden B. Arden B. 10:00 - 10:30 = | Arden H. Arden B. Arden B. 10:00 - 10:30 = |
| 11:00am | Isaac V. Ma G. 11:00 - 11:30 = | Isaac V. Ma G. 11:00 - 11:30 = | Isaac V. Ma G. 11:00 - 11:30 = | Arden H. Arden B. Arden B. 11:00 - 11:30 = | Arden H. Arden B. Arden B. 11:00 - 11:30 = |
| 12:00pm | Isaac V. Ma G. 12:00 - 12:30 = | Isaac V. Ma G. 12:00 - 12:30 = | Isaac V. Ma G. 12:00 - 12:30 = | Arden H. Arden B. Arden B. 12:00 - 12:30 = | Arden H. Arden B. Arden B. 12:00 - 12:30 = |
| 1:00pm | Isaac V. Ma G. 1:00 - 1:30 = | Isaac V. Ma G. 1:00 - 1:30 = | Isaac V. Ma G. 1:00 - 1:30 = | Arden H. Arden B. Arden B. 1:00 - 1:30 = | Arden H. Arden B. Arden B. 1:00 - 1:30 = |
| 2:00pm | Isaac V. Ma G. 2:00 - 2:30 = | Isaac V. Ma G. 2:00 - 2:30 = | Isaac V. Ma G. 2:00 - 2:30 = | Arden H. Arden B. Arden B. 2:00 - 2:30 = | Arden H. Arden B. Arden B. 2:00 - 2:30 = |

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Schedule 9 – Lowell Elementary School/Early Childhood/ Whittier Middle School

| | Mon | Tue | Wed | Thu | Fri |
|----------|---|--------------------------|----------------------------|--|--|
| 8:00a.m | | | | | |
| 9:00a.m | 9:00 - 9:40 Lillian E. Mason M. Nye = | 9:00 - 9:40 Mia M. = | 9:00 - 9:40 Mia M. = | 9:00 - 9:40 Alyssa H. Quinlan N. Proskelle = | 9:00 - 9:40 Adam C. Koverly M. Gable M. |
| | 9:45 - 10:15 Lucas H. = | 9:45 - 10:15 Mia M. = | 9:45 - 10:15 Lucas H. = | 9:45 - 10:15 = | 9:45 - 10:15 = |
| | 10:15 - 10:45 = | 10:15 - 10:45 = | 10:15 - 10:45 = | 10:15 - 10:45 = | 10:15 - 10:45 = |
| 10:00a.m | 10:00 - 10:40 = | 10:00 - 10:40 = | 10:00 - 10:40 = | 10:00 - 10:40 = | 10:00 - 10:40 = |
| | 10:45 - 11:15 = | 10:45 - 11:15 = | 10:45 - 11:15 = | 10:45 - 11:15 = | 10:45 - 11:15 = |
| 11:00a.m | 11:00 - 11:30 = | 11:00 - 11:30 = | 11:00 - 11:30 = | 11:00 - 11:30 = | 11:00 - 11:30 = |
| | 11:35 - 12:05 = | 11:35 - 12:05 = | 11:35 - 12:05 = | 11:35 - 12:05 = | 11:35 - 12:05 = |
| 12:00p.m | 12:00 - 12:40 = | 12:00 - 12:40 = | 12:00 - 12:40 = | 12:00 - 12:40 = | 12:00 - 12:40 = |
| | 12:45 - 1:15 = | 12:45 - 1:15 = | 12:45 - 1:15 = | 12:45 - 1:15 = | 12:45 - 1:15 = |
| 1:00p.m | 1:00 - 1:40 = | 1:00 - 1:40 = | 1:00 - 1:40 = | 1:00 - 1:40 = | 1:00 - 1:40 = |
| | 1:45 - 2:15 = | 1:45 - 2:15 = | 1:45 - 2:15 = | 1:45 - 2:15 = | 1:45 - 2:15 = |
| 2:00p.m | 2:00 - 2:40 = | 2:00 - 2:40 = | 2:00 - 2:40 = | 2:00 - 2:40 = | 2:00 - 2:40 = |
| | 2:45 - 3:15 = | 2:45 - 3:15 = | 2:45 - 3:15 = | 2:45 - 3:15 = | 2:45 - 3:15 = |
| 3:00p.m | 3:00 - 3:40 = | 3:00 - 3:40 = | 3:00 - 3:40 = | 3:00 - 3:40 = | 3:00 - 3:40 = |
| | 3:45 - 4:15 = | 3:45 - 4:15 = | 3:45 - 4:15 = | 3:45 - 4:15 = | 3:45 - 4:15 = |
| | 4:20 - 4:50 = | 4:20 - 4:50 = | 4:20 - 4:50 = | 4:20 - 4:50 = | 4:20 - 4:50 = |

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Sioux Falls School District

July 1, 2015

Developing a Long-Term Cohesive and Actionable Strategic Plan

Proposal

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Approach and Methodology

Districts are confronting dwindling budgets, growing regulation, rising accountability, increasingly diverse student populations, and a variety of stakeholders with competing interests. With myriad challenges and many countervailing concerns, it is no wonder that many districts end up creating very lengthy strategic plans. Too often, these lengthy plans prove unwieldy, and districts find themselves unable to deliver on the competing objectives articulated in these plans. The District Management Council (DMC) firmly believes that great power lies in creating a highly focused strategy. Rather than creating a long list of objectives, DMC believes in creating a strategic plan centered on a small set (ideally less than five) of the most critical levers for improving performance. These levers then need to be integrated and incorporated into all district activities to drive improvement.

The District Management Council also recognizes the importance of stakeholder support to creating and implementing an effective strategic plan. Plans created in silos without the necessary input and vetting by stakeholders (both internal and external) have limited potential for success. However, inviting significant stakeholder and community input and failing to incorporate the feedback into the strategic plan can also prove problematic, causing frustration and disillusionment. Therefore, a critical part of our work is working with the district to engage the community and stakeholders in meaningful discussions at critical junctures in the process. The result is a targeted, inclusive, and implementable strategic plan that is based on district needs and has wide stakeholder buy-in.

DMC's Strategic Planning Framework

DMC has developed a strategic planning framework to facilitate the creation of a focused and integrated strategic plan. The strategic planning framework is made up of five levels of objectives with increasing degrees of specificity that all must be aligned and interconnected (Please see Exhibit 1). It is a methodical approach to identifying and articulating a broad aspirational goal for the district, and then connecting this to concrete goals and specific implementation tactics.

- **Aspirations:** Aspirational goals capture the district's broad vision and create a clear definition of where the organization wants to be in the future.
- **Theory of Action:** The theory of action articulates a set of beliefs, policies, and practices as to how the aspirations can be achieved.
- **Priorities:** Priorities are broad, thematic areas of focus that articulate how the district will concretely support the aspirations and the theory of action.
- **Measurable Goals:** Measurable goals are specific and measurable targets related to district priorities. These well-defined goals ensure that objectives are clear and progress can be tracked against these quantified goals.
- **Initiatives:** Initiatives are specific actions related to each priority that will help to achieve the measurable goals. While the aspirations, theory of action and the priorities articulate the "*what*", the initiatives articulate the "*how*" – they outline what needs to happen by when and by whom.

The school board and the superintendent generally take the lead on articulating the aspirations, the theory of action, and priorities. The district leadership team then takes these aspirations, theory of action, and priorities, and works to translate these into measurable goals and initiatives—the work that will be done in the district. Obviously, there is collaboration in this process, but creating some distinction in the

roles provides greater focus and greater ownership. Taken together, these interconnected elements will ensure a cohesive and actionable strategic plan.

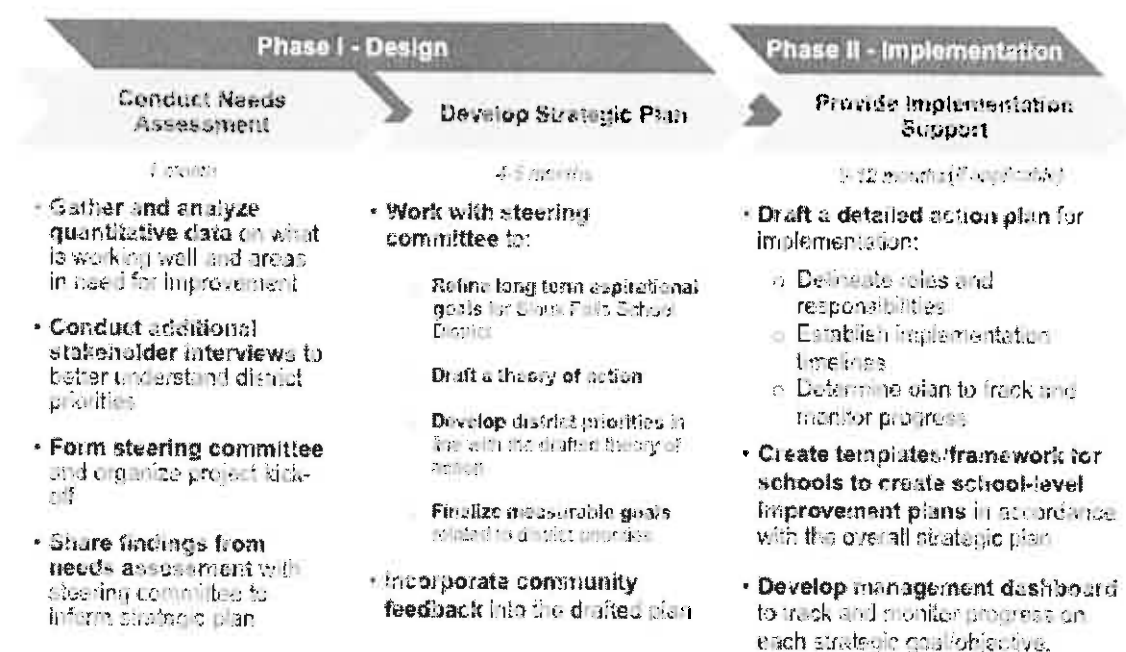
Exhibit 1: The DMC Strategic Planning Framework: Connecting Vision, Goals & Implementation



Strategic Planning Process

To work through the framework outlined above, DMC has developed a systematic, yet customizable, 2-phase process used by districts around the country to develop, refine, and implement a strategic plan and to generate the support of district leaders and stakeholders alike (Please see Exhibit 2). A sample of a work plan for DMC's 2-phase process is also included in order to provide greater detail. (Please see Exhibit 3).

Exhibit 2: The DMC Strategic Planning Process*



Phase I: Conduct needs assessment

DMC believes that before embarking on planning for the future, it is essential to begin with a clear and accurate understanding of the current state of performance of the district. And, it is important that key members involved in the strategic planning process are all beginning with a common understanding.

There are two types of data that DMC uses for this purpose –qualitative and quantitative. Working with the district and specifically the strategic planning committee, DMC performs extensive analysis of the performance-related data in the district and also methodically gathers qualitative information on what is working well and what may be in need of improvement. More specifically:

- Quantitative Assessment/Data Collection:** The DMC team begins by gathering, analyzing, and synthesizing baseline data. The data examined comprises academic achievement data (consisting of data from various transition points across subjects such as Grade 3 ELA, Grade 8 Math, Grade 10 ELA and Math etc.), college readiness data (such as high school graduation rate, SAT performance, AP test takers scoring 3-5) and school climate data (such as school suspension rate, school dropout rate and school attendance rate).
- Qualitative Assessment:** Quantitative information is only one side of the coin, and great insights can be gleaned from qualitative information. Therefore, the strategic planning process includes a series of interviews and conversations with various key stakeholders to ensure these observations are

incorporated to obtain a comprehensive understanding of the district. Discussions with key stakeholders at this initial phase ensure that significant stakeholder concerns begin to be incorporated early on in the process.

Upon completion of the quantitative and qualitative assessments, DMC analyzes and digests the information to deliver a succinct and insightful report on the state of performance of the district. This information is an essential first step to providing a clear sense of where the district stands and to identifying key concerns, thereby allowing the district to identify areas that may need additional focus to drive maximum student improvement.

Phase I: Develop the strategic plan—aspirations, a theory of action, and district priorities

This phase involves working with district leaders, board members, and other identified individuals to share findings from Phase I, and begin conversations around future planning for the district. The work begins with articulating the aspirational goal—a broad vision of what the district should be and should achieve.

This is followed by extensive work to define a theory of action. Formulating a theory of action may sound simple, but crafting a powerful theory of action to successfully drive change is challenging work. It means articulating a set of core beliefs about the key drivers necessary to make the aspirations a reality. A list of elements of a school district theory of action can be found in Appendix I. For example, one district's theory of action might be based on managed instruction—a belief that the district's central office must directly control instruction in order to increase student achievement; at the opposite end of the spectrum, another district's theory of action might be to promote what is sometimes referred to as “empowerment”—a belief that the system should focus on results, with increased accountability and autonomy for independent decision-making throughout the organization. The theory of action captures the fundamental belief about what will drive change for the district. This theory of action then determines the strategic path that the district will follow to achieve results. Distilling myriad beliefs, theories, and approaches to a theory of action is challenging work. DMC has extensive experience in working with districts through these complex discussions to develop powerful theories of action.

Driven by the district's theory of action, a short, focused list of top priorities is identified. Then, for each key priority, SMART (Specific, Measurable, Aggressive yet Achievable, Relevant and Time-bound) goals are created to further convert big ideas into concrete actionable next steps.

Phase I: Stakeholder and Community Engagement

Ongoing involvement of various stakeholder groups and the community are essential to creating a successful strategic plan. However, it is important to engage stakeholders and community effectively and in a meaningful manner.

Often, districts hold a series of meetings with many different stakeholder groups. Stakeholders generally welcome these opportunities to air their concerns and issues. After dozens of these meetings with different groups across different communities, the district ends up gathering long wish-lists or lists of concerns and complaints. Attempting to incorporate all this feedback, the strategic plan quickly become a lengthy laundry list of objectives. All too quickly, these types of strategic plans become overwhelming, with no one knowing quite where to start or what to focus on. Alternatively, some districts collect all this

feedback from stakeholders and then revert to them with a focused plan that seems to ignore far too many of the issues and concerns raised. This, too, proves problematic. Stakeholders, seeing that their feedback has been omitted, feel ignored and grow frustrated and disenfranchised. Discontent brews and interest and support for the new strategic plan vanishes.

Therefore, DMC has created a community and stakeholder engagement strategy that aligns with the strategic planning framework. The qualitative assessment conducted in Phase I includes interviews and conversations with a select group of key stakeholders so that their perspectives and insights can be heard early in the process and can inform the discussions from the very beginning. Then, the initial creation of a draft strategic plan is left to the school board, superintendent, and district leadership. Once a draft strategic plan is in place, a series of meetings with the community and various stakeholders are held. Having a draft plan to share with the community and stakeholders grounds the discussion. There is a draft to react to and respond to. These meetings provide essential insight into different perspectives, can highlight details that may have been overlooked, and provides an opportunity for feedback and reaction.

This process also helps to create broader understanding and buy-in and ensures that the district's plan is kept in the forefront of people's minds. Having a draft plan to focus on and hearing various participants' reactions to the plan can help build some understanding among the group and an appreciation for the complexities at hand. While it may not create complete consensus, it creates some appreciation of the needs of the district and some sense of the tradeoffs that the district needs to make.

DMC has significant experience facilitating these community and stakeholder meetings; we facilitate soliciting and melding varied and divergent opinions to create an inclusive plan. One important aspect of our approach is that we try to manage expectations that not all opinions and ideas may find their place in the final plan. Our approach is to provide opportunities to bring people together to enable them to understand and focus on the needs of the district and respond to a draft plan. We try to facilitate the discussions in such a way as to help the group rise above their ideological differences, or at very least, to appreciate that there are such differing ideological differences that must somehow be factored in. In this way, the final strategic plan can have greater support, facilitating implementation and paving the way for meaningful results.

Phase II: Implementation (Optional)

The quality of a strategy is rarely defined by the strategy itself, but by the success in implementation of the strategy. Over the years, DMC has encountered school systems that in fact have created excellent strategic plans; but in too many cases, these plans have been left languishing on bookshelves as compliance mechanisms. Effective implementation requires careful analysis, detailed planning and communication, analytics to track progress, and cultivation of leadership capacity at various levels of the organization. And, strong implementation must be tailored to the needs of the district and take into account the district's strengths and weaknesses, as well as the funding available.

DMC has developed a variety of services and tools to help districts in this critical implementation phase. Because implementation needs vary so much by district, the implementation phase is separate from Phase I and II, and must be carefully tailored for each district following the development of the strategic plan. The following is a listing of some of the supports and tools that DMC had developed to help districts in the implementation phase. A district may choose to use some or all of these supports in the implementation of their strategic plan.

- **Developing Action Plans that are integrated with the systems, structure, and work of the district:**

The action planning process requires careful consideration of the myriad activities required to accomplish each priority initiative. We begin by spending a considerable amount of time understanding the existing initiatives and priorities, assessing their usefulness, linking together disparate initiatives and processes currently underway, and building on what is currently in place to effectively align the work with the new strategic plan. Our is not an “out with the old and in with the new” approach nor is it an exercise in layering more on top of what is currently being done; we seek to leverage and build upon the work being done in the district and create a coherent and aligned approach to moving the work forward.

- **Defining Roles, Responsibilities, Timelines, and Resources:**

In addition to carefully identifying all the initiatives to be pursued, the roles and responsibilities of various school and central office personnel are carefully delineated, and timelines and milestones are clearly defined for each initiative. In addition, the implementation process invariably requires some reallocation of resources to ensure that the necessary resources are in place to support the implementation. DMC works with the district to assess opportunities for reallocation in order to ensure that the necessary resources are available to execute the strategic plan.

- **Developing a Dashboard to Convert Vision into Reality:**

For DMC, a critical part of the implementation process is working with districts to create performance measures and objectives aligned to the agreed-upon aspirations and priorities. DMC emphasizes the importance of the strategic plan as a living, breathing part of the district’s approach that should be felt in each and every school building. We work with the district to create structures, systems, and tools to convert the vision into reality.

DMC will work with the district to build a “performance management dashboard” tool. This comprehensive tool codifies specific performance metrics to document and track where the district stands vis a vis each strategic goal/objective. The dashboard then specifies the baseline level of performance for each metric, the desired level of performance, the timeframe, and the people with primary responsibility for achieving success. The dashboard provides transparency in measuring strategic progress and assists in determining funding priorities.

By breaking down the overall strategy to this level of detail, the performance management dashboard holds all parts of the organization accountable for their contribution to fulfilling strategic priorities. By sharpening the link between tangible daily work and the overarching strategy, the dashboard also gives stakeholders a holistic view that can enhance their motivation and understanding of the big picture.

These steps to link strategic priorities to specific actions and then to manage progress through an integrated system will enable the district to monitor implementation of the strategic plan. DMC has experience developing, implementing, and supporting the maintenance of several dashboards for districts across the country that have successfully leveraged them in order to maintain internal focus and/or to provide external transparency to their community. We can also integrate the dashboard into the existing district technology infrastructure.

Strengthening Leadership Capacity

Turning a strategic plan into action requires the appropriate professional development to ensure that the district has the leadership capacity it needs to produce measurable results. Embedding a mindset of continuous improvement and a commitment to long-term results is also essential to real, sustainable improvement.

DMC can work with the district to institutionalize and expand the capacity of the district management team and building-level leadership. DMC can provide a combination of professional development, individual coaching, peer group support, and a focus on performance results to help strengthen and institutionalize leadership capacity throughout the district.

The work has three distinct components:

1. Professional Development sessions

Professional Development sessions are specifically designed and targeted to address challenges and strengthen managerial and leadership skills. Professional Development sessions might address the following types of topics:

- Setting Goals
- Work planning
- Setting Priorities and Time Management
- Having Difficult Conversations
- Influence Mapping
- Change Management

2. Individual Coaching sessions

Individual Coaching provides opportunities for building leaders to receive support from seasoned coaches on an ongoing basis with coaching tailored to the specific context.

- School leaders are matched with an Executive Coach to help work through roadblocks, develop leadership capacity, and achieve their stated performance goals.
- Each participant receives one-on-one feedback and support from a DMC coach. Coaching sessions are designed to provide real time, practical professional development to each participant to assist him/her in achieving his/her performance challenges.

3. Performance Challenges with Peer Group Network: Your district's Management Institute

DMC can create for your district a Management Institute within your district to strengthen leadership capacity while working on a performance challenge within the district. DMC has found that one of the most powerful ways to develop leaders is to ask people to lead and achieve real performance results within their organizations. A performance challenge is a specific, measurable goal that contributes to a department, school, or district priority. In this case, the performance challenge chosen will be related to a strategic plan initiative.

In executing the performance challenges, the participants would not work in isolation. Rather, they would be a part of a peer group of fellow Management Institute participants, transcending departmental lines. By using a cross-functional network, participants tap a wide base of talent across the district to increase efficiency and consider new approaches in working toward each of their performance challenges. By allowing for interaction with other parts of the organization, the peer group also gives participants a more coherent view of the district.

Each peer group of Management Institute participants would be supported by DMC staff who provide a combination of professional development sessions and coaching to cultivate leadership capacity and allow participants to leverage the knowledge and talent within the peer group.

Sample of Preliminary Detailed Work Plan

| Phase | Task | DMC | District |
|---|---|-----|----------|
| Prep for Strategic Planning Work | 1. Identify stakeholders to lead the strategic planning process | // | // |
| | 2. Meet with the Board and Administration to identify lead priorities and plan the strategic planning process | // | // |
| | 3. Develop a month-by-month meeting plan and schedule | // | // |
| Conduct Needs Assessment | 4. Review the existing strategic plan and annual progress reports in order to establish a foundation for planning the new five-year plan | // | |
| | 5. Analyze other quantitative and qualitative performance data | // | |
| | 6. Conduct interviews with stakeholders to assess current areas of strength and improvement | // | |
| | 7. Share summary findings with key district leaders | // | |
| Develop Plan | 8. Share detailed findings from needs assessment, to inform development of strategic plan | // | |
| | 9. Engage with stakeholders to develop the following aspects of the strategic plan: | // | // |
| | a. Aspirations | | |
| | b. Theory of action | // | // |
| | c. Priorities | // | // |
| | d. Measurable goals | // | // |
| Implement* | 10. Conduct a gap analysis to identify initiatives required to be implemented in accordance with the identified priorities | // | // |
| | 11. Create detailed action plans to implement the initiatives, and assign roles and responsibilities across central office departments for these action plans | // | // |
| | 12. Develop clear activities and a monitoring plan to evaluate effectiveness of the action plans | // | // |
| | 13. Create templates/framework for schools to create school-level improvement plans that are in accordance with the overall | // | // |

| | | | |
|--|--|----|----|
| | strategic plan | | |
| | 14. Customize dashboard, and integrate into existing platforms/systems (if necessary) | ✓✓ | |
| | 15. Upload performance metrics and benchmark data for each initiative and strategy into dashboard platform | ✓✓ | ✓✓ |
| | 16. Develop processes for easy updating of dashboards | ✓✓ | |
| | 17. Conduct staff training on dashboards | ✓✓ | |
| | 18. Prepare regular reports to review the future progress of implementation | ✓✓ | |

**Cost of implementation phase is not included as part of this proposal. The cost and scope of implementation support will be determined at a later date after the draft of the strategic plan has been finalized.*

Note: Timeframe will vary according to scheduling, accessibility of data and key individuals, and district calendar. The time reflected herein is an approximation and the actual time worked on each tasks may vary.

Distinguishing Features of DMC's Strategic Planning Services

Experience in working with districts to develop strategic plans

DMC brings both a deep and broad perspective to the strategic planning process. We have extensive experience working closely with school districts around the country in crafting and implementing successful strategic plans. DMC recently partnered with a large, urban district that serves over 84,000 students in over 200 schools, with 84% of students eligible to receive free and reduced lunch. This district engaged DMC to develop a strategic direction for the school board that aligned with district needs. DMC engaged each school board member to examine district needs to create district-wide aspirations and priorities. As an outcome of this aligned vision, DMC further helped the school board develop board priorities and measures, and align CEO evaluation goals and measures to map to strategic priorities. By combining deep experience from both the education and private sectors, DMC brings a multifaceted approach to solving some of the most difficult and important questions facing U.S. public school districts.

Experience in Engaging Stakeholders and the Community

Through the experience garnered from various strategic planning engagements over the years, DMC has vetted and created a community and stakeholder engagement strategy that aligns with the strategic planning framework. This process helps our clients develop a targeted, inclusive, and implementable plan that is based on facts and district needs and has wide stakeholder buy-in.

DMC understands the importance of involving a wide variety of stakeholders in the strategic planning process. Plans created in silos without the necessary vetting and input of diverse stakeholders have limited potential to be successful. Although only a few key members of the district's central office organization may be part of the work group tasked with drafting the strategic plan, it is important to engage other stakeholders and community members (including parents, funders, students, the school board, etc.) in the process. Importantly, stakeholder and community involvement serves several key purposes:

- Ensures that the district vision and goals are kept in the forefront and properly prioritized
- Creates a broad understanding and buy-in on the criteria for selection of priorities, goals, initiatives, etc. This ensures a community-friendly product, and creates advocates for the district strategic plan, paving the way for a smoother implementation in the future.
- Provides essential insight into the perspective of others, and also unravels certain details that may have been overlooked in the initial planning process.

The stakeholder engagement efforts will build upon the outreach efforts that the district has already undertaken. As an example of an effective stakeholder engagement, DMC was engaged to assist in the formulation of a stakeholder engagement plan for a district in Virginia. DMC worked with the communications office to assess stakeholder views about the district, and to develop a targeted messaging strategy for each of the important stakeholders. DMC conducted internal and external interviews, focus groups, and surveys in order to gather a fact base about stakeholder perceptions of district performance.

Combining Strong Analytics with Qualitative Assessments

As part of the strategic planning process, DMC collects and analyzes relevant data to assist the district in assessing their current state of performance and determining the desired future position of the school district.

As a first step, the DMC team will gather, analyze and synthesize baseline data. There are two types of data that DMC uses for this purpose –qualitative and quantitative:

- The quantitative data is a compilation of academic achievement data (consisting of data from various transition points across subjects such as Grade 3 ELA, Grade 8 Math, Grade 10 ELA and Math etc.), college readiness data (such as high school graduation rate, SAT performance, AP test takers scoring 3-5) and school climate data (such as school suspension rate, school dropout rate and school attendance rate). This data provides an understanding of the district's area of strength and areas needing more support/attention.

We then take this analysis further by comparing the district data to like-districts. DMC takes an integrated look at performance by various relevant school groupings as determined by the state or by the district. We focus on various categories of performance indicators such as performance on state test results, college readiness, and school climate. These are indicators of long-term success and enable cross-district comparison. In addition, we look at process measures that research has determined to be leading indicators of school turnaround. This perspective gives all stakeholders a clear sense of where the district stands today and the areas that may need additional focus to drive maximum student improvement.

- While all this data and analyses provide valuable insights, quantitative information is only one side of the coin. The strategic planning process also involves collecting qualitative information on the effectiveness of various initiatives and general feedback as to what the district needs to prioritize or reduce attention on. Qualitative information is gathered through interviews and conversations with key stakeholders to ensure a comprehensive understanding of the district.

DMC delivers, in a succinct fashion, the key findings from this quantitative and qualitative analysis. This forms the basis for the crafting of a focused, comprehensive, long range three to five-year plan.

Skilled Facilitation

Facilitating and strengthening collegiality and unity among senior district leaders is a core skill for DMC. School districts have various internal and external stakeholders, each with a unique purpose, role and responsibility. Our team regularly leads facilitated discussion for school boards and district leadership teams in order to meld varied and divergent opinions to create an inclusive plan but also manage expectations such that not all opinions find their place in the final plan. Through DMC's facilitation, districts have witnessed collaboration among district leaders, school board members, and other stakeholders to achieve the desired results.

Over the last five years DMC has led more than 100 facilitated planning meetings with public school leaders. As a facilitator we know when to take a back seat, when to intervene, and when to share experiences of other school districts. In the last few years we have facilitated strategic plan development in multiple urban school districts and several multi-day conferences on the subject. Our facilitation skills are further honed by our experience in planning and implementing full day and multi-day seminars for superintendents and district leaders. Such events have taken place in Boston, Massachusetts, New York, New York, and Miami, Florida.

Ideally a strategic planning effort is an opportunity to bring people together in a way that will enable them to rise above their ideological differences and to focus on the needs of the district. This can be an important stepping-stone toward greater stability and innovation in the district.

Relevant Experience

DMC's experience in the field of Strategic Planning include the following:

Goal-Setting

In **Ector County (TX) Independent School District**, DMC worked with the senior leadership team to define "SMART" goals that would help drive execution of their strategic plan. The prior year's planning process had created a comprehensive yet overwhelming strategic plan, which the district struggled to put into action. DMC worked with the leadership team to define "SMART" goals for each department that would drive execution of the strategic plan. These goals were then used to create one short list of aligned district-wide priorities – clearly laid out on one page – for the short term, medium term, and long term. This priority list provided a communication tool for the school board, school-based staff, and the community to help align all stakeholders around the district's focus areas.

Stakeholder engagement

DMC was engaged to assist in the formulation of a stakeholder engagement plan for **Fairfax County Public Schools**. DMC worked with the FCPS Communications Office to assess stakeholder views about the district (and about the budget process), and to develop a targeted messaging strategy for each of the important stakeholder groups. DMC conducted internal and external interviews, focus groups, and surveys in order to gather a fact base about stakeholder perceptions of district performance and the budget process. As a result, the FCPS Communications Office developed a detailed communications plan. Implementation of this plan began almost immediately as the district entered into the process of closing an 8% budget gap.

Facilitating strategic planning with a school board

In **a school district in Pennsylvania**, DMC worked closely with the school board, superintendent and leadership team to develop a comprehensive, aligned strategic plan using DMC's strategic planning framework to connect aspirations, strategy & implementation. The process was inclusive and ensured a shared vision and clear roles and responsibilities between the superintendent and school board. The final plan created focused and targeted opportunities to raise achievement in the district, all of which are closely aligned with the district's theory of action.

DMC was subsequently engaged to provide ongoing implementation support to help district leaders and building administrators turn opportunity into reality. Our work focused on four key areas: elementary literacy, secondary reading intervention, improved graduation rates, and leadership development/succession planning.

Ultimate results

The district developed a strategic plan with clear, concise goals and priorities to propel the district toward further improvement in student achievement. The district succeeded in establishing targeted annual and long-term outcomes, as well as creating an overarching plan to revisit the policies that support these goals. They also achieved significant clarity in roles and responsibilities between the School Board and Superintendent.

General strategic planning

DMC supported **a district in Maryland** to create an aligned set of performance measures and objectives to execute on a set of agreed-upon aspirations and priorities.

Through extensive facilitation and planning, DMC worked with the Board of Commissioners and the superintendent and his team to create a revised strategic framework for articulating the district's approach to raising student achievement. Also, the team identified related performance goals with both annual and long-term targets, and created an execution plan. Finally, the process articulated a clear delineation of roles and responsibilities between the Board and CEO. These new standards of practice were used in the facilitated sessions led by DMC.

After the success of the strategic planning process, DMC helped create a district-wide accountability system for the district. The accountability system was centered on achieving the measurable goals identified as a result of the strategic planning process.

General strategic planning

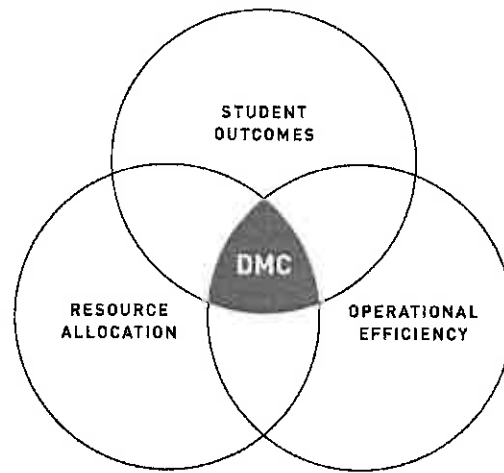
DMC successfully completed a project with **a large urban public school district** to create a strategic plan for expansion of inclusive practices for students with special needs in the district. DMC was tasked with formulating a five year strategy for moving students with special needs currently in substantially separate classrooms to inclusive classrooms where they could be taught alongside their peers.

About The District Management Council

The District Management Council (DMC) was founded in 2004 on the belief that strengthening the management capacity of school district leaders is essential for raising student achievement, improving operational efficiency, and allocating resources more effectively. Public school leaders have the enormous responsibility of providing students with the resources and skills to succeed and forge a successful future for our nation. To achieve these results, public school system leaders must not only be great educators, but also must be great managers.

DMC's mission is to supply superior strategic insights and practical solutions that will simultaneously improve student achievement, enhance operations, and reduce costs—symbolized as the DMC Mission in the graphic. We focus on delivering actionable and measurable management practices that will deliver long-term systemic benefits.

As a firm, DMC has a unique approach—combining membership, world-class consulting services, and technology solutions. The interplay between these elements is what helps DMC achieve better outcomes for districts: the experience of our membership informs and enhances our consulting services and technology solutions. We, in turn, share with our membership the results we help individual districts achieve. The cycle continues, and the momentum and impact grows.



| DMC Services Overview | | |
|---|---|--|
| Membership | Consulting | Technology Solutions |
| <p>DMC is a network of district leaders at the forefront of a national movement to make our public schools the best in the world. Today, member school districts serve more than 4.5 million students across 34 states.</p> <p>Membership includes:</p> <ul style="list-style-type: none"> D Subscription to <i>The District Management Journal</i> D Unlimited access to DMC's online library D Registration to DMC conferences | <p>DMC's consulting solutions are customized to meet the individual challenges and goals of our clients. We help school districts develop strategies, implement programs and practices, and ultimately, measure results. Practice areas include:</p> <ul style="list-style-type: none"> D Strategic Planning D Human Capital D Special Education D Resource Allocation D District Turnaround | <p>To ensure that positive change becomes lasting change, DMC has created a suite of cost-effective, web-based technology solutions designed to improve communication, organization, and performance. By utilizing this infrastructure to sustain best management practices, districts can focus on staffing, district goals, and teacher development. DMC provides the following technology solutions:</p> <ul style="list-style-type: none"> D dmStaffing® D dmPlanning® |

Consulting






We draw upon the best research across the education, business, government, and non-profit sectors and combine it with practical experience from the work we have done in member districts nationwide. Our approach is customized to the unique circumstances, needs, and objectives of each of our client districts. In our consulting practice, we have worked with dozens of school districts across the country in four primary areas of focus:

- **Strategic Planning**: Strategic planning helps districts reach long-term goals by setting priorities based on a district's theory of action. DMC focuses on district-level strategy, superintendent entry plans, and school improvement plans that jump-start a school's turnaround.
- **Human Capital**: DMC helps districts bring out the best in people. We help identify, recruit, cultivate, and retain the most talented teachers and staff while using tools such as Teacher and Principal Evaluation, Succession Planning, Differentiated Pay, Leadership Development, and Career Development.
- **Resource Allocation**: Maintaining and improving district performance is dependent on the smart and strategic allocation of resources. DMC guides districts through staffing strategies, budget redesign, weighted student funding, outcome-based resource allocation, and the reconciling of budget and strategy.
- **Special Education**: DMC is dedicated to improving the lives and education of students with special needs while reducing the strain on school budgets. Specific emphasis is placed on reading instruction and intervention, roles of paraprofessionals, best practice service delivery models and scheduling and staffing tools.

DMC's consulting practice differs from many others in that we are hands-on. DMC partners with districts to put into practice the plans and solutions we developed together. We do not just present our clients reports and then walk away. The implementation phase of our work ensures that the strategic vision is fully realized by providing on-the-ground project management, change management, capacity building assistance, and integration of customized technology.

Senior Leadership

DMC's leadership team brings a wealth of experience to inform the work we do for school districts. Some of their qualifications include:

| | |
|--|---|
|  John J-H Kim CEO | <ul style="list-style-type: none"> • Senior Lecturer, Harvard Business School • Co-chair, Harvard University Public Education Leadership Project (PELP). • Guiding a comprehensive multi-year planning effort for many districts to help meet the academic, operational and financial needs of diverse communities. • Managing the development and implementation of an innovative and powerful new teacher evaluation system for various districts. |
|  Nathan Levenson President | <ul style="list-style-type: none"> • Former Superintendent and School Board Member of Arlington Public Schools (Arlington, MA). • Author of <i>Spending Money Wisely</i>; <i>Smarter Budgets, Smarter Schools</i>; <i>Stretching the School Dollar</i>; and, <i>Something Must Change: Rethinking Special Education</i>. • Leading a redesign of special education in a mid-sized district that started with an in-depth study of both general and special education services which resulted in improved academic support for students as well as annual savings exceeding \$3M. |
|  Craig Gibbons Vice President of Engineering | <ul style="list-style-type: none"> • 20 plus years of experience in the development and management of high-performance teams and delivery of industry leading technology solutions. • Former head of engineering for a top provider of cloud-based video presentation solutions, helping businesses improve sales, marketing and training effectiveness. • Creating award-winning enterprise and consumer based products on both the web and mobile platforms. • Creating customized web-based solutions for staffing and scheduling for districts across the US. |
|  Diane Ullman Senior Director | <ul style="list-style-type: none"> • Former Superintendent of Simsbury Public Schools (Simsbury, CT), a nationally recognized top-performing school district. • Leading improvement initiatives including implementing a new vision for classroom technology, a reorganization of special education services, a new strategic planning process, professional learning communities, and K-12 standards-led curriculum and instruction. • Former Chief Talent Officer for the Connecticut State Department of Education. |
|  Mark Wiernusz Senior Director | <ul style="list-style-type: none"> • Former L.E.K. Consulting Manager and U.S. Army Pilot-in-Command. • Working with a 55,000 student district to implement a rigorous process in identifying school success intended to improve school performance and foster alignment to district goals. • Assisting a large urban school district to develop a comprehensive Human Capital strategy that ensures all schools are staffed with highly effective teachers. • Performing a financial implication study to assess impact of teacher enrollment and participation in state pension programs. |

Senior Advisors

Dr. Karla Brooks Baehr

Dr. Baehr has most recently retired as the Deputy Commissioner of Accountability, Assistance and Partnership at the Massachusetts Department of Education (DESE). Prior to her work at DESE, Baehr served as a superintendent for nearly twenty years in urban and suburban districts.

Dr. Jack D. Dale

Dr. Dale is the former Superintendent of Fairfax County Public Schools (FCPS), Virginia, and Frederick County Public Schools, MD. He is co-editor and author of the book: *Creating Successful School Systems* and has conducted trainings on teacher compensation systems.

Dr. Peter Gorman

After a career in public education, Dr. Peter Gorman joined News Corporation as a senior vice president in the education division, focusing on the use and application of technology in schools. Prior to this, he served as superintendent of Charlotte-Mecklenburg Schools (NC), which was awarded the 2011 Broad Prize for Urban Education shortly after his departure.

Mr. Andrew J. Parsons

Mr. Parsons currently serves as Director Emeritus of McKinsey and Company Inc., a leading international management consultancy. He has served clients globally on strategic, organizational, and functional issues in the consumer goods and services, retail, marketing, media, and pharmaceutical/medical devices sectors.

Dr. Thomas W. Payzant

Dr. Payzant is currently a Professor of Practice at the Harvard Graduate School of Education. The focus of his work is leadership and systemic reform in urban schools and districts. He served as Superintendent of the Boston Public Schools from 1995 until his retirement in 2006. Prior to Boston, he was appointed by President Clinton as Assistant Secretary for Elementary and Secondary Education.

Dr. Ed Pratt-Dannals

Dr. Pratt-Dannals recently retired as the Superintendent of Duval County Public Schools and during his tenure, graduation rates increased from 59.8% to 71.2% (NGA), students completing a college ready curriculum increased from 65.7% to 82.9%. Prior to becoming Superintendent, Dr. Pratt-Dannals was a Math teacher, coach, vice-principal and principal and the Chief Academic Officer in the district.

Mr. George Russell

Mr. Russell recently retired as the Superintendent/CEO of the Eugene Public Schools in Eugene, Oregon, where he served as superintendent for 12 years. Prior to this, he served as the executive director of human resources for the Eugene school district.

Pricing Proposal

DMC has developed a transparent, comprehensive, all-inclusive, "no-surprises" approach to pricing. The cost for delivering on the proposal outlined above is typically \$175,000. Given the extensive partnership we have enjoyed with the Sioux Falls School District over the past several years and in consideration for our continuing work together, we are pleased reduce this fee by \$35,000 and charge a net of **\$140,000**. This price includes all expenses, such as travel time, airfare, hotel, postage, printing, and supplies.

The cost of Phase II- Implementation Phase is not included in this proposal. The cost and scope of the implementation phase will be determined at a later date once the draft of the strategic plan is complete. If implementation support (Phase II) is desired, an implementation plan will be discussed and developed to address your district's specific needs and desired scope. This phase will be priced separately.

Terms of Payment:

The district will be billed monthly. A late fee of 1.5% per month will be assessed for invoices over 60 days.

Access to DMC Resources:

For the duration of the district's engagement with DMC, the district will have access to DMC's online library of best practices, subscription to *The District Management Journal* on best practices in education, and invitations to DMC organized events and conferences.

Hold Harmless:

DMC agrees to hold harmless and indemnify the Sioux Falls School District, its officers, agents and employees, from and against any and all actions, suits, damages, liability or other proceedings which may arise as a result of the religious performance of services by DMC hereunder. This section does not require DMC to be responsible for or defend against claims or damages arising solely from acts or omissions of the Sioux Falls School District, its officers or employees.

Insurance:

DMC agrees, at their sole cost and expense, to maintain general liability insurance of at least \$500,000 during the period of this agreement. Upon request, the Contractor will provide proof of insurance.

Entire Agreement:

This Agreement is made pursuant to and shall be governed by the laws of the State of South Dakota. This Agreement is binding upon the parties hereto, their successors and assigns. This instrument contains the entire agreement between the parties, and no statement, promises, or inducements made by either party or agent or either party that are not contained in this written contract shall be valid or binding. This contract may not be enlarged, modified, or altered except in writing signed by the parties and endorsed hereon.

Accepted by:


Sioux Falls School District 49-5

 / 
Kent Alberty / Todd Vik
President / Business Manager

August 24, 2015

Accepted by:

The District Management Council

 (signed)
John Kim / CEO (Name/Title)

Aug 3, 2015 (Date)

CONTRACT NO. 16-032
BOARD ACTION 37409.D2e
board date 3/14/16



Sioux Falls School District

February 12, 2016

Implementing the District's Strategic Plan

Proposal

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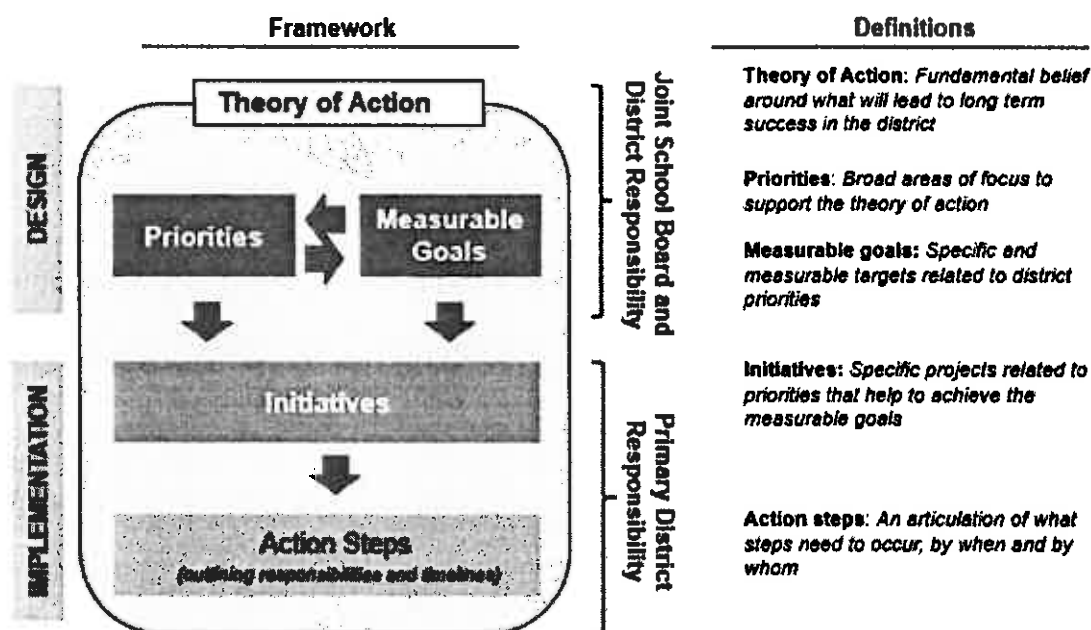
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Proposed Approach to Strategic Planning Implementation

District-level strategy helps set the course for successfully navigating the growing number of challenges and competing interests that come from every direction: dwindling budgets, growing regulation, rising accountability, and an increasingly diverse student population. In this environment of competing interests and dwindling resources, we believe that a strategic plan should be focused. We believe in the importance of prioritizing a small set of the most important levers for improving performance. DMC has developed a strategic planning framework in order to help facilitate the creation of a focused and integrated strategic plan as shown below.

Exhibit 1: Strategic Planning Framework



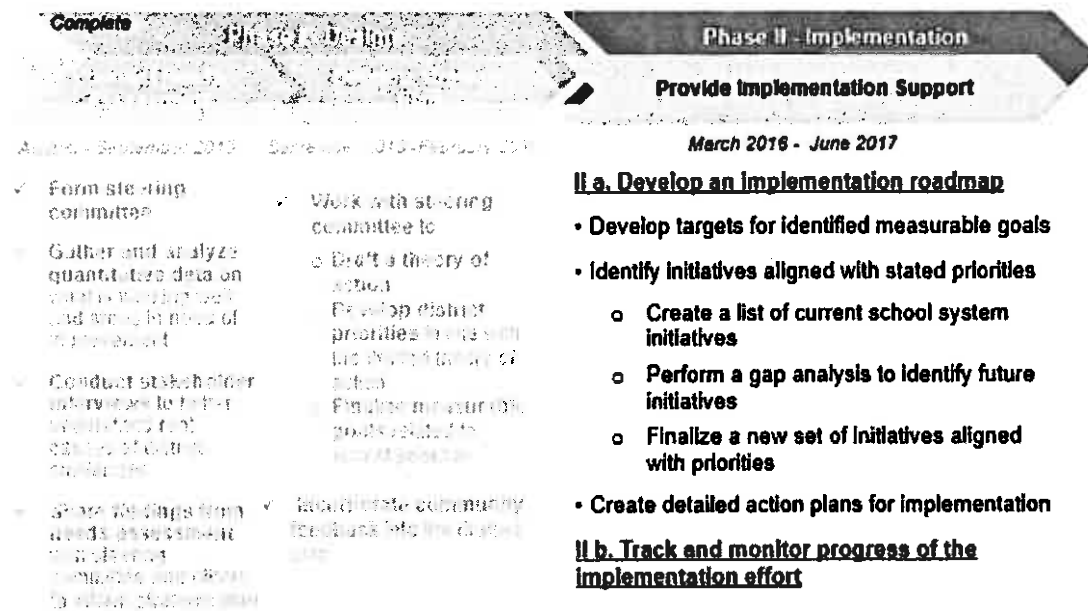
DMC worked with Sioux Falls over the past few months on phase I (design phase) of the strategic planning effort which entailed defining three important components of the strategic plan - the theory of action, strategic priorities and SMART measurable goals.

But our focus is not just on defining a plan to showcase the spectacular vision of the district. Our focus is on bringing about tangible, measurable change in the district and on delivering results. We believe that our success should be measured by ensuring that the strategic plan becomes integrated and incorporated into district activities. It should become the roadmap to stronger performance. This requires definition of a comprehensive action plan, and careful focus on implementation with frequent monitoring.

Phase II of the strategic planning work will focus on successful implementation of the strategic priorities defined in the design phase and will consist of the following sub-phases:

- **Phase II a. Develop an implementation roadmap (Mar – Aug'16)**
- **Phase II b. Track and monitor progress of the implementation effort (Sep'16 – Jun'17)**

Exhibit 2: Workplan



Details on the different steps involved across these two sub-phases are provided below.

Phase II a. Develop an implementation roadmap

- **Develop targets for the identified measurable goals:** This step will consist of setting targets for each of the defined measures that the district would attempt to achieve as the strategic plan is implemented district wide. The targets may be set as five year goals or as yearly thresholds. These targets will serve as an important accountability mechanism and will be used to track the efficacy of implementation efforts as the district attempts to make progress on the strategic priorities defined in the plan.

The process of setting targets will involve extensive data collection, analysis and consensus building that the DMC team will assist the district with, e.g.:

- Gather current and historical data on the measurable goals, evaluate historical rate of growth on the measures
- Gather data on the defined measures from comparable districts
- Build consensus among steering committee members around specific targets in a way that raise the bar for achievement in the district and yet are achievable

This is the last component of the strategic plan that will be defined by the steering committee consisting of board members as well as internal district staff members.

- **Identify initiatives aligned with strategic priorities:** Initiatives are specific projects related to each priority that will help to achieve the measurable goals. While the theory of action and the priorities articulate the “*what*”, the initiative articulate the “*how*” – they outline what needs to happen by when and by whom. For instance - by December 2016, the community partnership department in SFPS will forge partnerships with families, community groups and businesses to create and implement a joint plan that increases support to [predetermined

percentage of] schools and [predetermined percentage of] ELL students. The process of defining the initiatives will involve three specific steps:

- **Create a list of current school system initiatives:** Ours is not an “out with the old and in with the new” approach nor is it an exercise in layering more on top of what is currently being done; we seek to leverage and build upon the work being done in the district and create a coherent and aligned approach to moving the work forward. In alignment with this philosophy, we will begin by spending a considerable amount of time understanding the existing initiatives and assessing their usefulness. This will enable us to build on what is currently in place and to effectively align existing work with the new strategic plan.
 - **Perform a gap analysis to identify future initiatives:** Once the existing initiatives are aggregated and recognized, we will go on to explore alignment of these disparate initiatives and processes with priorities in the strategic plan. This process will highlight priorities that are not as heavily emphasized through the existing initiatives, thus exposing gaps in priority areas where additional initiatives may need to be defined.
 - **Finalize a set of initiatives aligned with priorities:** New initiatives will be formulated by district leaders in areas of identified gaps. Once a preliminary list of initiatives is created (consisting of a combination of existing and newly formulated), these will be presented to the Superintendent for final approval.
- **Create detailed action plans for implementation:** After the initiatives are outlined, this step will involve creation of detailed action plans to guide implementation of the initiatives. The action plans will include detailed roles and responsibilities of various school and central office personnel as well as key milestones to achieve as part of the implementation process. DMC will assist district leaders in defining these action plans by providing standardized templates and other best practice approaches that we have seen work well in other districts.

Phase II b. Track and monitor progress of the implementation effort

This is the phase where DMC will assume a project manager role and will take on responsibility for maintaining documentation, guidance and metrics on the progress of implementation of initiatives and execution on the defined action plans. Very tangibly, this phase will involve setting up systems and processes to frequently measure progress, and to document and track where the district stands vis a vis the defined targets and action plans. DMC will specify the desired level of performance, the timeframe, and the people with primary responsibility for achieving success. DMC will assist with setting up a cadence of regular meetings with the leadership team to review progress, investigate certain performance issues, communicate early warning signs and brainstorm steps for remediating situations where adequate progress has not occurred.

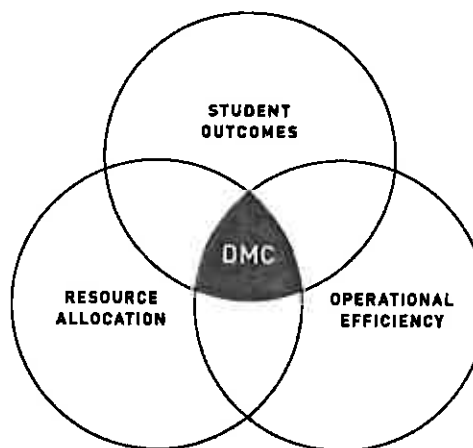
By breaking down the overall strategy to this level of detail, DMC holds all parts of the organization accountable for their contribution to fulfilling strategic priorities. By sharpening the link between tangible daily work and the overarching strategy, DMC will aim to give stakeholders a holistic view that can enhance their motivation and understanding of the big picture. This will also ensure transparency in measuring progress of implementation.

These steps to link strategic priorities to specific actions and then to manage progress through an integrated system will enable the district to monitor and ensure successful implementation of the strategic plan.

About The District Management Council

The District Management Council (DMC) was founded in 2004 on the belief that strengthening the management capacity of school district leaders is essential for raising student achievement, improving operational efficiency, and allocating resources more effectively. Public school leaders have the enormous responsibility of providing students with the resources and skills to succeed and forge a successful future for our nation. To achieve these results, public school system leaders must not only be great educators, but also must be great managers.

DMC's mission is to supply superior strategic insights and practical solutions that will simultaneously improve student achievement, enhance operations, and reduce costs—symbolized as the DMC Mission in the graphic. We focus on delivering actionable and measurable management practices that will deliver long-term systemic benefits.



As a firm, DMC has a unique approach—combining membership, world-class consulting services, and technology solutions. The interplay between these elements is what helps DMC achieve better outcomes for districts: the experience of our membership informs and enhances our consulting services and technology solutions. We, in turn, share with our membership the results we help individual districts achieve. The cycle continues, and the momentum and impact grows.

| DMC Services Overview | | |
|--|--|--|
| Membership | Consulting | Technology Solutions |
| <p>DMC is a network of district leaders at the forefront of a national movement to make our public schools the best in the world. Today, member school districts serve more than 4.5 million students across 34 states.</p> <p>Membership includes:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Subscription to <i>The District Management Journal</i> <input type="checkbox"/> Unlimited access to DMC's online library <input type="checkbox"/> Registration to DMC conferences | <p>DMC's consulting solutions are customized to meet the individual challenges and goals of our clients. We help school districts develop strategies, implement programs and practices, and ultimately, measure results. Practice areas include:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Strategic Planning <input type="checkbox"/> Human Capital <input type="checkbox"/> Special Education <input type="checkbox"/> Resource Allocation <input type="checkbox"/> District Turnaround | <p>To ensure that positive change becomes lasting change, DMC has created a suite of cost-effective, web-based technology solutions designed to improve communication, organization, and performance. By utilizing this infrastructure to sustain best management practices, districts can focus on staffing, district goals, and teacher development. DMC provides the following technology solutions:</p> <ul style="list-style-type: none"> <input type="checkbox"/> dmStaffing® <input type="checkbox"/> dmPlanning® |

Consulting






We draw upon the best research across the education, business, government, and non-profit sectors and combine it with practical experience from the work we have done in member districts nationwide. Our approach is customized to the unique circumstances, needs, and objectives of each of our client districts. In our consulting practice, we have worked with dozens of school districts across the country in four primary areas of focus:

- **Strategic Planning**: Strategic planning helps districts reach long-term goals by setting priorities based on a district's theory of action. DMC focuses on district-level strategy, superintendent entry plans, and school improvement plans that jump-start a school's turnaround.
- **Human Capital**: DMC helps districts bring out the best in people. We help identify, recruit, cultivate, and retain the most talented teachers and staff while using tools such as Teacher and Principal Evaluation, Succession Planning, Differentiated Pay, Leadership Development, and Career Development.
- **Resource Allocation**: Maintaining and improving district performance is dependent on the smart and strategic allocation of resources. DMC guides districts through staffing strategies, budget redesign, weighted student funding, outcome-based resource allocation, and the reconciling of budget and strategy.
- **Special Education**: DMC is dedicated to improving the lives and education of students with special needs while reducing the strain on school budgets. Specific emphasis is placed on reading instruction and intervention, roles of paraprofessionals, best practice service delivery models and scheduling and staffing tools.

DMC's consulting practice differs from many others in that we are hands-on. DMC partners with districts to put into practice the plans and solutions we developed together. We do not just present our clients reports and then walk away. The implementation phase of our work ensures that the strategic vision is fully realized by providing on-the-ground project management, change management, capacity building assistance, and integration of customized technology.

Senior Leadership

DMC's leadership team brings a wealth of experience to inform the work we do for school districts. Some of their qualifications include:

| | |
|--|---|
|  John J-H Kim CEO | <ul style="list-style-type: none"> • Senior Lecturer, Harvard Business School • Co-chair, Harvard University Public Education Leadership Project (PELP). • Guiding a comprehensive multi-year planning effort for many districts to help meet the academic, operational and financial needs of diverse communities. • Managing the development and implementation of an innovative and powerful new teacher evaluation system for various districts. |
|  Nathan Levenson President | <ul style="list-style-type: none"> • Former Superintendent and School Board Member of Arlington Public Schools (Arlington, MA). • Author of <i>Spending Money Wisely</i>; <i>Smarter Budgets, Smarter Schools</i>; <i>Stretching the School Dollar</i>; and, <i>Something Must Change: Rethinking Special Education</i>. • Leading a redesign of special education in a mid-sized district that started with an in-depth study of both general and special education services which resulted in improved academic support for students as well as annual savings exceeding \$3M. |
|  Craig Gibbons Vice President of Engineering | <ul style="list-style-type: none"> • 20 plus years of experience in the development and management of high-performance teams and delivery of industry leading technology solutions. • Former head of engineering for a top provider of cloud-based video presentation solutions, helping businesses improve sales, marketing and training effectiveness. • Creating award-winning enterprise and consumer based products on both the web and mobile platforms. • Creating customized web-based solutions for staffing and scheduling for districts across the US. |
|  Diane Ullman Senior Director | <ul style="list-style-type: none"> • Former Superintendent of Simsbury Public Schools (Simsbury, CT), a nationally recognized top-performing school district. • Leading improvement initiatives including implementing a new vision for classroom technology, a reorganization of special education services, a new strategic planning process, professional learning communities, and K-12 standards-led curriculum and instruction. • Former Chief Talent Officer for the Connecticut State Department of Education. |
|  Mark Wiernusz Senior Director | <ul style="list-style-type: none"> • Former L.E.K. Consulting Manager and U.S. Army Pilot-in-Command. • Working with a 55,000 student district to implement a rigorous process in identifying school success intended to improve school performance and foster alignment to district goals. • Assisting a large urban school district to develop a comprehensive Human Capital strategy that ensures all schools are staffed with highly effective teachers. • Performing a financial implication study to assess impact of teacher enrollment and participation in state pension programs. |

Pricing Proposal

DMC has developed a transparent, comprehensive, all-inclusive, "no-surprises" approach to pricing. The cost for delivering on the proposal outlined above is **\$220,000**. Since much of the work outlined in the proposal will be frontloaded in the first few months, \$100,000 will be charged for the period of March to June 2016 and \$120,000 for July 2016 to June 2017. This price includes all expenses, such as travel time, airfare, hotel, postage, printing, and supplies.

Terms of Payment:

The district will be billed monthly. A late fee of 1.5% per month will be assessed for invoices over 60 days.

Access to DMC Resources:

For the duration of the district's engagement with DMC, the district will have access to DMC's online library of best practices, subscription to *The District Management Journal* on best practices in education, and invitations to DMC organized events and conferences.

Accepted by:

Sioux Falls School District 49-5

District

Kent Alberty/Todd Vik

Name

President/Business Manager

Signature

Date

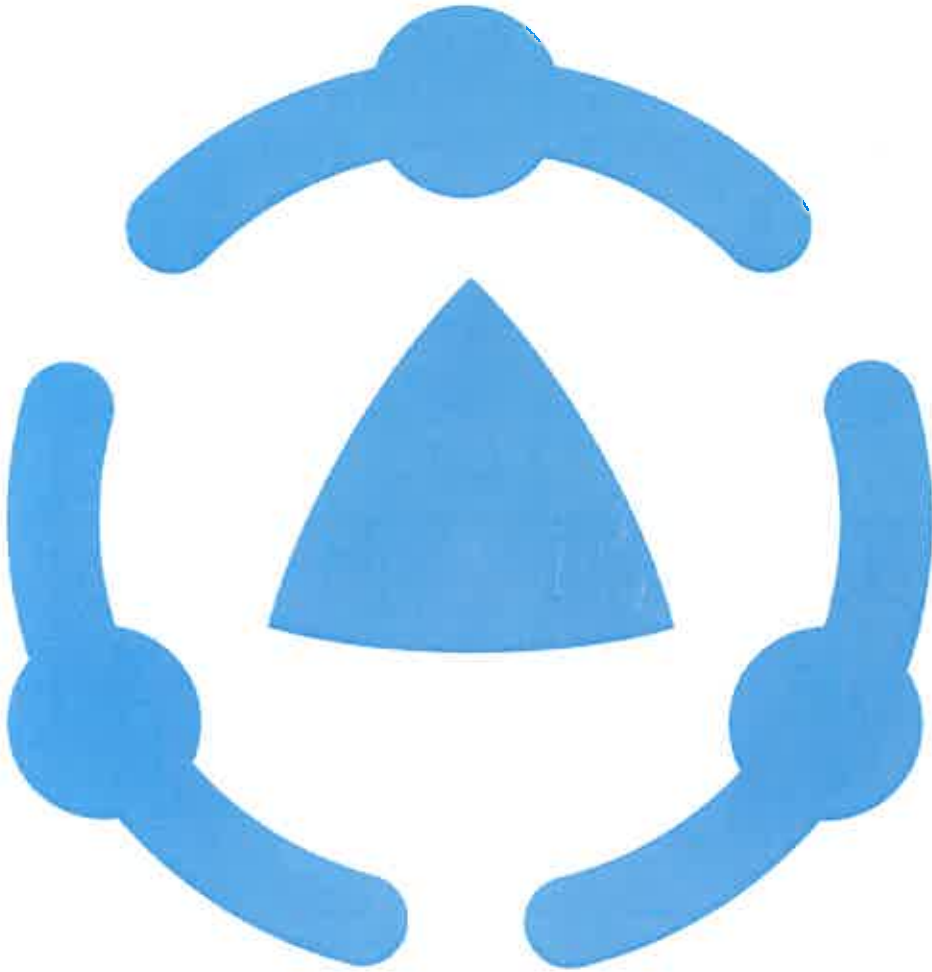
Accepted by:

The District Management Council

Name

Signature

Date



Elementary School Scheduling Solution

*Creating student-centered schedules that
incorporate teaching and learning best practices*

Proposal for

Sioux Falls School District

October 1, 2018



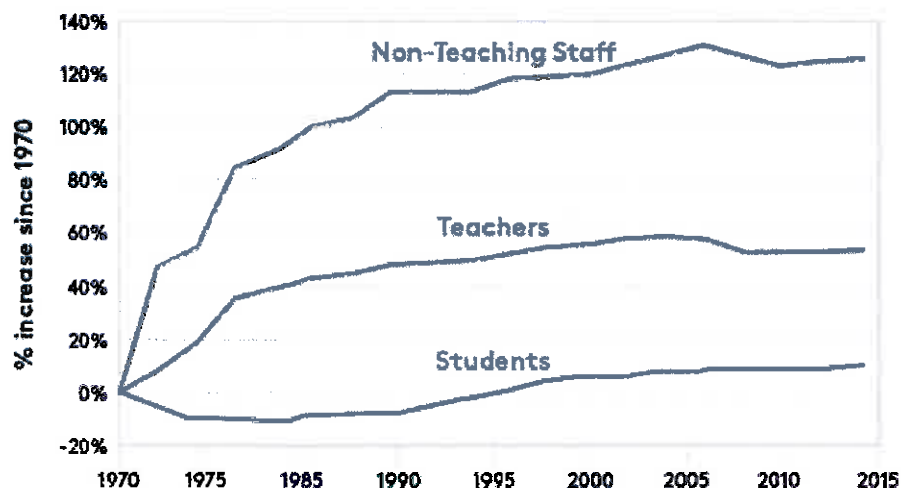
Introduction

The Scheduling Challenge

The Increasing Complexity of Today's Elementary Schools

Not long ago, most elementary school students spent the majority of their day in their classrooms with their homeroom teacher, with only a few short breaks for specials, lunch, and recess. Elementary schools could meet the needs of students with a small staff comprised of classroom teachers, specials teachers (like art, music, and PE teachers), a secretary, and a nurse.

Over the past few decades, elementary schools have been challenged to meet rising academic standards and address increasing student needs. In response, elementary schools have increased programming and personnel. Not only has the number of teachers increased, but the number and type of support positions has grown to now include counselors, reading teachers, ELL staff, behaviorists, social workers, instructional coaches, and aides. Since 1970, non-teaching staff in schools has grown over 15 times faster than student enrollment.



Since 1970 non-teaching staff in schools has grown over 15 times faster than student enrollment.

Elementary School Principals: Leading a Complex Organization without the Tools and Supports Needed

Today, each elementary principal leads a complex organization. Each principal must manage a large roster of teachers and a myriad of staff roles to deliver a broad range of programs and services to its students. And all these teachers and staff must be scheduled to deliver these services within the same 180 school days, constrained by tight budgets and adherence with the district's contractual obligations.

School and district leaders manage all these challenges as best they can, but the tools they have simply haven't kept pace with the increasing complexity. Today, most elementary schedules are still created with pencil, paper, sticky notes, or perhaps Excel as "a better piece of paper" as has been done for decades. The master building schedule is set first; then classroom teachers begin to map out their instructional blocks and special educators, reading teachers, related services, and many others begin creating their own schedules—again, with sticky notes, pen, and paper. All too often, this scheduling is done in isolation from one another without visibility to students' or colleagues' schedules.

Because scheduling is so challenging, school and staff often settle for a schedule that "works"—the one that manages to fit in all the necessary pieces of the puzzle, regardless of whether it best reflects the district's and school's priorities or if it is optimized to meet students' needs. It is rare that a school or district has the time or scheduling expertise to iterate multiple versions to uncover the schedule that best addresses students' needs.

For example, school leaders want to implement best practices such as common planning time or no pull-out during reading and math or daily intervention for struggling readers, but too often they throw up their hands and deem it impossible due to scheduling constraints. "The schedule simply won't allow it!" is an all-too-common refrain. Lengthening the day or adding staff is often viewed as the only solution, but limited funding makes that equally challenging.

Creating Better Elementary Schedules with DMGroup Expertise, Software and Support

Our experience shows that when districts and/or schools set clear, coherent priorities paired with scheduling expertise, many highly-desired goals that had seemed unattainable can in fact be achieved in virtually every school without increasing costs or lengthening the school day.

It is virtually impossible for an individual person to manipulate the many schedules, needs, and constraints of so many teachers, staff, and students that must go into creating the best schedules. DMGroup therefore has created powerful software that incorporates teaching and learning best practices gleaned from our research. This proprietary software is combined with support from our dedicated team of scheduling experts to allow your principals and staff to create and implement strategic schedules in your schools and district.

DMGroup's proprietary software will allow you to craft elementary master building schedules, general education teacher schedules, and elementary specials schedules that utilize a collaborative, holistic approach to scheduling as opposed to having schedules created in isolation. And all these schedules can be created in a matter of days as opposed to weeks of work. As needs change during the year, the software makes it easy to adjust the schedule and provides insights to help you understand the effectiveness of changes.



DMGroup's Scheduling Software will help you go from this:



To this:

Master Building Schedule

District Management Group | Demo Public Schools - School Scheduling - | John Smith | Log Out | Help

Schedules District Information - **2017-18**

Adams Elementary [Full Schedule](#)

Master school schedule

| | Elementary | Grade 1 | Grade 2 | Grade 3 | Grade 4 | Grade 5 | Grade 6 | Grade 7 | Grade 8 |
|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| Reading | Reading | Reading | Reading | Reading | Reading | Reading | Reading | Reading | Reading |
| Math | Math | Math | Math | Math | Math | Math | Math | Math | Math |
| Science | Science | Science | Science | Science | Science | Science | Science | Science | Science |
| History | History | History | History | History | History | History | History | History | History |
| Art | Art | Art | Art | Art | Art | Art | Art | Art | Art |
| Music | Music | Music | Music | Music | Music | Music | Music | Music | Music |
| Physical Education | Physical Education | Physical Education | Physical Education | Physical Education | Physical Education | Physical Education | Physical Education | Physical Education | Physical Education |
| Special Education | Special Education | Special Education | Special Education | Special Education | Special Education | Special Education | Special Education | Special Education | Special Education |
| Intervention | Intervention | Intervention | Intervention | Intervention | Intervention | Intervention | Intervention | Intervention | Intervention |
| Enrichment | Enrichment | Enrichment | Enrichment | Enrichment | Enrichment | Enrichment | Enrichment | Enrichment | Enrichment |

See the entire school schedule including each grade and section and the efficiency of specials and intervention and enrichment scheduling.



DMGroup's Elementary School Master Building Scheduling Solution

DMGroup's comprehensive elementary scheduling solution combines in-depth expertise with our proprietary cloud-based software and implementation support services to allow principals and district leaders to create powerful master building schedules as well as schedules for elementary classroom and specials teachers. With the software and services, principals and staff can create high-impact schedules that incorporate teaching and learning best practices to ensure that the most good is being done for the most students.

Expertise

We combine the expertise garnered from our best practice research, our experience working with hundreds of districts, lessons from expert schedulers, our proprietary database, and research garnered from years of studying the practices of high-performing and cost-effective elementary schools.

Proprietary Software

Our easy-to-use software has embedded best practices that guide principals and staff towards best practice schedules. It also provides and highlights the key data schedulers need at their fingertips to build more effective schedules. The software allows you to take a holistic approach in creating an elementary master schedule, as well as general education and specials teacher schedules. You will be able to try different scenarios, weigh tradeoffs, and select the schedules you like best. Our user-friendly editing features allow you to make adjustments to your schedules to provide the personalization, wisdom, and sensitivity to the district's history and culture that only human intervention can bring.

Implementation Support

A dedicated DMGroup client solutions team will be assigned to work directly with your district; we get to know your unique history and culture, so we can provide specific guidance and insight as you build your schedules and experiment with scenarios to meet your district and school scheduling needs.

We also support you throughout the implementation phase by providing regular check-ins, creating timetables, and ensuring smooth implementation. Simply put, our team will ensure timelines are met. Too often in districts, senior leaders and building principals are pulled in hundreds of different directions and the urgent trumps the important. Our project management ensures these opportunities become reality—on schedule, despite the many distractions that are certain to arise. Our implementation work includes fine-tuning the process and incorporating lessons learned.

To us, success is not about just delivering you powerful software; success is about helping you make sustainable improvements for your students, teachers, and staff, and turning best practice into common practice.



Deliverables

DMGroup's Elementary School Master Building Scheduling Solution will provide:

- **Master building schedules and general education classroom schedules** that tightly align to district and school priorities and embed best practices for teaching and learning. The elementary master schedule is the foundation upon which all other schedules are built and therefore must be crafted carefully and strategically. Our scheduling software and services will help you create a master schedule for your school that will allow incorporation of virtually all best practices without increasing costs or lengthening the school day.
- **Elementary specials schedules** (e.g. art, music, PE) that ensure equitable offerings to students as well as fair workloads for staff. Too often, specials schedules don't best meet the needs of students or staff. For example, in some schools (1) not all students receive equal amounts or equal breadth of specials, (2) some staff have more onerous workloads than others, and (3) specials schedules sometimes force reading and math blocks to be split. These inefficiencies do not benefit students or teachers, and result in higher costs.
- **Management Insights** help you gain a deep understanding of how students are being served. Our process begins with an in-depth analysis of your schedules. We benchmark your current practices to best practices to identify strengths and areas for improvement. Once you have crafted your new schedules, our technology allows you to view how time is being spent and how students are being served; you can gain visibility into core instruction time, specials offered, and intervention and enrichment opportunities, and can easily make adjustments if needed.



DMGroup's Elementary School Master Building Scheduling Solution

DMGroup's Elementary School Master Building Scheduling Solution combines our extensive research and scheduling expertise with our proprietary software and implementation support. Our proprietary software incorporates scheduling best practices to allow you to build schedules that achieve instructional best practices, improve equity, and make the most of student and teacher time. With this proprietary software and with the support of our team of scheduling experts, your principal will be able to quickly and easily craft a “best-in-class” master schedule as well as individual homeroom and specials teachers’ schedules.

DMGroup's scheduling software:

- Is easy to use
- Reduces the effort it takes to prepare schedules, often from weeks to just days
- Significantly simplifies school and general education staff schedule creation
- Allows for experimentation with different scheduling scenarios
- Facilitates the revision and sharing of school, general education, and specials schedules
- Enables team collaboration thereby avoiding the pitfalls of uncoordinated efforts

Built-In Instructional Best Practice Guidance

Our software has instructional and scheduling best practice guidance “built in” and provides a holistic approach to creating an elementary master schedule and schedules for general education classrooms and specials. Instructional guidelines can be set as defaults, and within these guidelines, the software supports exploration of different scenarios and weighing of tradeoffs so that you can select the schedule that best meets your needs.

Our best practice master schedules typically include virtually all of these best practices:

- Daily common planning time opportunities
- Uninterrupted 90-minute (or more) block for ELA
- Uninterrupted time block for math
- No pull-out from core math and reading core instruction
- Daily intervention/enrichment period



- Special education teacher time to plan with grade-level teachers
- Equitable access to specials such as art, music and physical education
- Cost effective staffing and scheduling of specials like art music and PE
- Opportunities for instructional coaches to work with teams of teachers
- Opportunities to group students with similar needs for interventions across multiple homerooms

DMGroup's technology and approach allow you to craft a master building schedule and elementary specials schedules that are focused on student needs and support teaching and learning best practices.

Sample of Schedules Built with DMGroup's Scheduling Approach



Individual homeroom and specials teacher schedules as well specials rotations are generated automatically as you construct your master schedule.

Adams Elementary

Homeroom teacher schedules | Grade II, Section A - Smith

| | Day 1 | Day 2 | Day 3 | Day 4 |
|------------------------|------------------------|------------------------|------------------------|------------------------|
| Reading | Reading | Reading | Reading | Reading |
| Writing | Writing | Writing | Writing | Writing |
| Math | Math | Math | Math | Math |
| Science/Social Studies | Science/Social Studies | Science/Social Studies | Science/Social Studies | Science/Social Studies |
| Art | Art | Art | Art | Art |

Homeroom Teacher Schedules

Adams Elementary

Specials teacher schedules | Art - Richards

| | Day 1 | Day 2 | Day 3 | Day 4 |
|------------------------|------------------------|------------------------|------------------------|------------------------|
| Reading | Reading | Reading | Reading | Reading |
| Writing | Writing | Writing | Writing | Writing |
| Math | Math | Math | Math | Math |
| Science/Social Studies | Science/Social Studies | Science/Social Studies | Science/Social Studies | Science/Social Studies |
| Art | Art | Art | Art | Art |

Specials Teacher Schedules

Adams Elementary

Specials rotations | Art - Richards

| | Day 1 | Day 2 | Day 3 | Day 4 |
|------------------------|------------------------|------------------------|------------------------|------------------------|
| Reading | Reading | Reading | Reading | Reading |
| Writing | Writing | Writing | Writing | Writing |
| Math | Math | Math | Math | Math |
| Science/Social Studies | Science/Social Studies | Science/Social Studies | Science/Social Studies | Science/Social Studies |
| Art | Art | Art | Art | Art |

Specials Rotations

DMGroup's Elementary School Scheduling Solution

A Simple 6-Step Master Schedule Creation Process

DMGroup will provide support and training and work in partnership with the principals through the following six steps to help your principals create highly effective master building schedules.

Step 1: Needs Assessment

Our approach begins with a needs assessment in which we analyze your schedules. The district will be asked to provide basic information such as copies of the current master schedules, general education and specials teacher schedules, number of sections by grade, teacher planning time, and specials offered. Your principals should take into account, and make note of, contractual obligations and state requirements when providing this data. Once this data request template is completed and returned, DMGroup will review the data and prepare questions for clarification in step 2.

Step 2: Establish Schedule Goals

A DMGroup scheduling expert will conduct a workshop with district and school leadership to discuss scheduling and instructional best practices. We then work together to align district goals and priorities while considering the needs of each school. This workshop will also help identify elements of the current schedule that are working well and opportunities for improvement.

Step 3: Creation of Master Building Schedules

Using our elementary school scheduling software, best practice research, and experience working with schools nationwide, DMGroup will prepare draft master building schedules. These draft master building schedules will incorporate best practices and take into consideration the schools' goals. This will then be shared with the principals, who will work with a DMGroup expert to discuss tradeoffs and refine the schedule in real time. After the conclusion of this interactive session, we will create and deliver final drafts that incorporates principal feedback. Based on this draft of the master schedule, our scheduling software also generates homeroom teacher schedules, specials rotations, and specialist schedules.



Step 4: Run Scenarios and Create Alternative Schedules

Each building principal will receive a license to our elementary school scheduling software. Our software is easy to use, but we also provide ample software training to ensure that the principal becomes comfortable working independently to experiment with different scenarios, compare options, and make modifications until the schedule is finalized. Unlike manually produced schedules, our software makes it very easy to experiment with various options and refinements, and we have found that principals enjoy being able to explore different approaches.

A principal can also quickly create schedules for delayed opening, early release, and professional development days. While typically not required, a principal has the option to expand the contract for additional DMGroup support in creating additional schedules.

Step 5: Share Master Building Schedules and Specialists Schedules

Once the master building schedules are finalized, our software automatically generates supporting schedules that can be distributed to leadership and teachers. This includes:

- Master building schedule
- Early release master building schedule
- Delayed start master building schedule
- Specialists rotation plan
- Individual specialist's schedules
- Individual homeroom teacher schedules

Step 6: Follow up: Lessons Learned

DMGroup will follow-up, via online surveys, to gather feedback from your principals. The initial survey sent over the summer will request feedback on the schedule creation process; a subsequent survey sent in the late fall will request feedback on the effectiveness and impact of the schedules. This feedback will be summarized to help to inform future scheduling improvements.



Putting Elementary Scheduling into Action

Implementation Rollout (sample)

Our elementary scheduling solution includes a methodical approach to implementation. The district will help set the right pace for its schools.

School Year One

Typically, during the first school year the new master building schedules are developed. In the first year, our team does much of the heavy lifting, with building principals providing input and refinement. The DMGroup team will analyze schedules, across the district, and review findings with district and school leadership.

School Year Two

In year two, the master schedule creation process is transitioned to the principals. Our team works with principals to review the district guidelines, scheduling goals, and prioritization. Principals then create the first draft of the schedules with our team providing guidance and support.

| Year 1 | Year 2 | Year 3 |
|--|--|---|
| Assess strengths and shortcomings of current schedules and scheduling process | Support implementation of new schedules | Annual software subscription for DMGroup's best practices elementary master school scheduling software |
| Determine financial efficiency of current schedules | Revisit district guidelines for scheduling, and adjust as needed | Software support and training, included with your software subscription, to answer any software related questions for principals |
| Identify and prioritize key goals and schedule components | Strengthen district processes for scheduling learning support teachers | Additional levels of optional support are available based on the scheduling needs determined by your district |
| Analyze, review and discuss alternatives and tradeoffs with central office and building leaders | Create master building and specialist schedules for the upcoming year and update as enrollment projections change | |
| Create master building and specials schedules for the upcoming year and update as enrollment projections change | | |



Complimentary DMCouncil Membership

Throughout the length of the district's engagement with DMGroup, the district will have full access and benefits of a district membership including access to DMGroup's online library of best practices, and invitations to DMGroup organized leadership development events and conferences, including our annual Superintendents' Strategy Summit. If you are not already familiar with the benefits of DMCouncil membership, we will schedule a membership onboarding call once this engagement proposal is agreed.

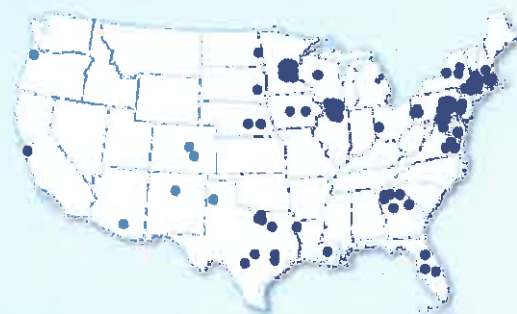
BENEFITS

- Share ideas with a **community of forward-thinking leaders** from across the country
- Stay abreast of **leading research** on management and education best practices to improve outcomes
- Increase management capacity through an array of **professional development** opportunities:
 - ✓ Superintendents' Strategy Summit for superintendents only
 - ✓ Leadership Development Meetings for cross-functional district teams
 - ✓ In-district training for leadership teams
- Access **expert advice** for specific challenges
- Read the ***District Management Journal*** for insightful articles and case studies on how districts have achieved sustainable improvements

DMCouncil

- Established 2004 -

JOIN A NATIONAL NETWORK
OF OVER 1,500 DISTRICT LEADERS



150 districts

1,500 district leaders

24 states

4 million students served



Pricing Proposal

Pricing Proposal for School Year 1 – Year 2

In order to ensure that this effort is well implemented and established inside the district, the first two school years include a full set of services and supports. After the second school year, the district has the option to tailor the service to its needs.

Elementary School Master Scheduling Software Licenses and expenses: Included in school years 1 – 2 are software licenses (\$900 per school, per year) for all master scheduling staff in the schools covered by this proposal, as well as training, maintenance, software support, in-district support, and travel expenses incurred by our team.

Pricing and Terms

The total cost for providing the services outlined above for school years 1 & 2 for 23 elementary schools is \$181,125. This pricing includes both a multi-year project fee reduction as well as a further 10% fee reduction based on our long and enduring partnership with Sioux Falls School District and our appreciation for the opportunity to continue to serve you. This pricing is valid for a period of 90 days from the date of initial receipt of this proposal.

DMGroup will invoice at the start of each school year. A late fee of 1.5% per month will be assessed for invoices over 60 days. Please note that our work is front-loaded in Year 1 in order to set up and initialize the software and to establish a deep understanding of your district's current practices, culture, and needs.

Accepted by:

District Sioux Falls School District 49-5

Name Kent Alberty /Todd Vik
President /Business Manager

Signature [Signatures]

Date 11-14-18

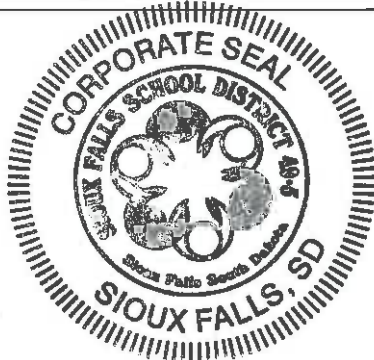
Accepted by:

District Management Group

Name Craig Gibbons VP
Printed Name Title

Signature [Signature]

Date 11/19/18



Pricing Options for School Year 3 & Beyond

Beginning in School Year 3 and for each year thereafter, the district can select, 90-days prior to the start of the school year, the level of support desired. The district may elect to upgrade its service level at any time.

Service Support Options

☐ **Software and Support**

The district will have full use of our elementary school master scheduling software, including all enhancements and upgrades, and will have access to web-based software support.

Pricing: \$900 per school, per year

☐ **Remote Scheduling Support**

In addition to Software and Support services, a dedicated client service team will provide scheduling expertise and a review of schedules created remotely through video conferencing and conference calls.

Pricing: \$3,750 per school, per year

☐ **On-site Scheduling Support**

In addition to all of the Remote Scheduling Support services, your schools will receive on-site support including scheduling expertise, continued professional development, and a review of schedules created.

Pricing: \$5,000 per school, per year

****Annual per school pricing includes the elementary master school scheduling software license.***

For more information on these additional supports, please call us toll free at 877-362-3500 or email us at info@dmgroupk12.com.

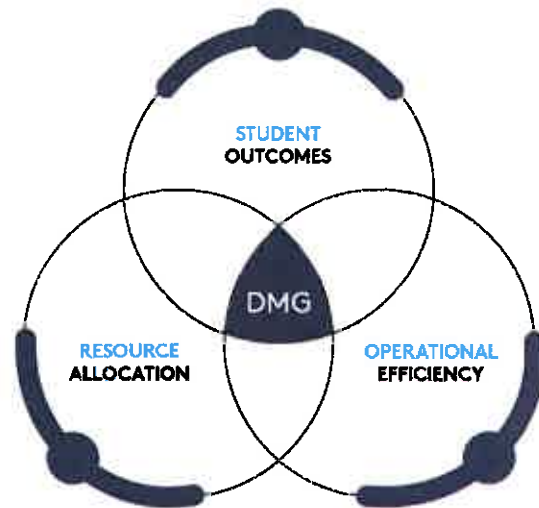


About District Management Group

Founded in 2004, District Management Group seeks to address the most important management challenges facing American public school leaders. The leaders of our school systems are charged with the enormous responsibility of providing students with the resources to succeed in school and beyond. To achieve this, district and school leaders must not only be great educators, they must also be great managers. District Management Group seeks to provide district leaders with the best management techniques and educational practices to produce measurable, sustainable improvements that help schools and students thrive.

Our unwavering focus is on solutions that improve student outcomes, and simultaneously enhance operational efficiency and resource allocation. Achieving only one of these objectives in isolation is not enough. It is in achieving these three objectives simultaneously that improvements in student outcomes and the public education system as a whole can be made sustainable.

To achieve these objectives, District Management Group engages with districts in three different ways:



Learning

District Management Group supports superintendents, district leaders, and school leaders with information and learning opportunities.

- **Professional Development** opportunities for school and district leaders includes conferences as well as in-district one and two-day workshops, leadership academies, and custom professional learning programs
- **Best Practice Resources** includes print and digital subscriptions to our signature publication *District Management Journal* as well as case studies, articles, and toolkits.

Membership

Becoming a member of District Management Council provides unique opportunities to be with like-minded peers and to learn together as well as from each other. Membership also provides forward-thinking district leaders with access to expert advice on an as-needed basis and extended professional learning opportunities including our annual Superintendents' Strategy Summit.

Services

District Management Group's combination of deep expertise, unique data-driven approaches, and software solutions can help districts address challenges in the following areas:

- Elementary and Secondary Scheduling
- Special Education
- Strategic Planning
- Program Evaluation
- Strategic Budgeting
- Systemic improvement supported by custom consulting to help districts achieve strategic priorities

District Management Group Values



Partnership

We believe in partnering with school districts to achieve results. While districts may share common objectives and face similar challenges, each district is unique, with its own history, culture, and ways of working. We get to know our partner districts, tailor solutions and implementation plans, and form long-term partnerships.



Achieving Results

Our work does not end with a report. For us, the measure of our success is client satisfaction and real results for students and schools. As we partner with districts, we seek to strengthen capacity. If desired, we work with districts to implement recommendations and facilitate change management.



Collaboration

We believe we know more together than we do alone. That is why we draw on best practices from the education sector as well as the private sector and public sector and collaborate with a nationwide network of school districts.



Systems Thinking

School districts are complex organizations. We believe that true and enduring solutions require looking beyond the specific challenge at hand and taking a broader, systemic view.

District Management Group partners with public school districts to bring about transformational, measurable, and sustainable improvement to help schools and students thrive.

Learn more about us at www.dmggroupK12.com, or please contact us toll free at 877-362-3500 or email us at info@dmggroupK12.com.

District Management Group combines management techniques and education best practices to produce measurable, sustainable improvements that help schools and students thrive.

